



PR LOG #:

**DUTY STATEMENT**

CIVIL SERVICE CLASSIFICATION				WORKING TITLE	
Education Fiscal Services Consultant				Legislative Budget Consultant	
BRANCH					
Chief of Staff's Office					
DIVISION			OFFICE		
Government Affairs Division			Fiscal Policy Office		
CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION	
R21	E	0413	174-310-2898-004	Sacramento	
PROBATIONARY PERIOD		TENURE		TIME BASE	BILINGUAL POSITION
12 Months		Permanent		Full-Time	No
TELEWORK OPTION		SAFETY SENSITIVE POSITION		CONFLICT OF INTEREST CLASSIFICATION	
Hybrid		No		Yes	
<b>DIRECTION STATEMENT AND GENERAL DESCRIPTION OF DUTIES</b>					
<p>Under the direction of the Director of Government Affairs Division, the Education Fiscal Services Consultant (EFSC) works independently to oversee a variety of highly sensitive and complex technical analytical assignments related to fiscal policy. The incumbent will provide expertise and advice related to K–12 education, school finance, and the state budget to the public, the Legislature, the local educational agency (LEA) governing board members, administrators, Department of Finance (DOF), California Department of Education (CDE) management and staff, and other state agencies. This position is responsible for policy formulation, providing direction, advocating, and providing technical assistance and support to establish or change funding relevant to California’s childcare and PreK to 12th grade.</p>					
<b>CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS</b>					
All employees are expected to work cooperatively with others, maintain regular, consistent, predictable attendance, and possess integrity, initiative, dependability and good judgment.					
<b>SUPERVISION BY</b>					
Kimberly Rosenberger, Director of Government Affairs Division					
<b>SUPERVISORY RESPONSIBILITIES</b>					
N/A					
<b>WORKING CONDITIONS AND PHYSICAL REQUIREMENTS</b>					
This position is eligible for telework in accordance with the Statewide Telework Policy, and will be required to report to the office as needed/required. The successful candidate must reside in California upon appointment. Employee will be expected to sit at a desk for an extended duration, and walk or drive between CDE headquarters.					

**ESSENTIAL/NON-ESSENTIAL FUNCTIONS**

Relative % of Time Required: <input style="width: 50px;" type="text" value="50"/>	<input checked="" type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
<b>Duties Performed</b>		
<p>Budget development and administration. This includes overseeing preparation of technical schedules to be submitted to the Department of Finance, training program managers and staff on budget processes, reviewing budget change proposals prepared by program staff, and working with all levels of department management on budget priorities and issues. Keep management apprised of status of assignments and issues/problems in assignment area. Develop funding proposals and provide technical assistance to Department of Finance, Legislative Committees, and Legislative Analyst regarding the development of language in the annual Budget Act and related legislation regarding state funding and other funding issues. Testify before Legislative committees and speak to state and regional associations.</p>		

Relative % of Time Required: <input style="width: 50px;" type="text" value="25"/>	<input checked="" type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
<b>Duties Performed</b>		
<p>Provide oversight to the P98 calculation and various components within the guarantee, including K–12 attendance, property taxes, state General Fund revenue, and other elements intrinsic to Proposition 98. Direct the development and dissemination of Prop 98-related information, including: presentations to state and regional school finance organizations, reports to the legislature, letters to the field, memos to department and other government agency personnel.</p>		

Relative % of Time Required: <input style="width: 50px;" type="text" value="15"/>	<input checked="" type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
<b>Duties Performed</b>		
<p>Perform special projects, and assist other staff with critical projects, including department-wide budget training programs and budget bill tracking process.</p>		

Relative % of Time Required: <input type="text" value="10"/>	<input checked="" type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
<b>Duties Performed</b> Advise and make recommendations to management on fiscal and policy issues. Direct staff in researching Education Codes and proposed legislation. Collaborate with others in the section, division and/or department, as needed, to share information and ensure consistent messaging throughout the department.		

Relative % of Time Required: <input type="text"/>	<input type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
<b>Duties Performed</b>		

Relative % of Time Required: <input type="text"/>	<input type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
<b>Duties Performed</b>		

**SPECIAL/ADDITIONAL REQUIREMENTS AND DESIRABLE QUALIFICATIONS**

Knowledge of K-12 finance, practices, principles, and trends in public education, as well as effectively and efficiently manage a staff and program within the resources provided; review and edit written documents; establish and maintain project and departmental priorities; work effectively with administrative personnel in the Department and in other governmental agencies; supervise subordinate staff; and effectively contribute to the Department's affirmative action objectives.

Ability to establish and maintain cooperative relations with local, state, and federal officials and agencies; provide leadership and direction for a program of the Department; work effectively with top administrative personnel in the Department and other agencies; and supervise office staff.

**PERSONAL CONTACTS**

--

**EMPLOYEE ACKNOWLEDGEMENT**

*I have read and understand the duties and requirements listed above, and I am able to perform these duties with or without an accommodation. (If you believe an accommodation may be necessary, or if unsure of a need for an accommodation, inform the hiring supervisor or the Accommodations Coordinator at Accommodations@cde.ca.gov.)*

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE

**MANAGER/SUPERVISOR ACKNOWLEDGEMENT**

*I certify this duty statement represents a current and accurate description of the essential functions of the position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.*

MANAGER/SUPERVISOR NAME	MANAGER/SUPERVISOR SIGNATURE	DATE

HRD C&P ANALYST	HRD APPROVAL DATE	EFFECTIVE DATE	DATE UPLOADED

**This form will be kept in the employee's Official Personnel File.**

Original - Classifications & Pay Office

Copies - Employee and Supervisor



PR LOG #:

**DUTY STATEMENT**

CIVIL SERVICE CLASSIFICATION				WORKING TITLE			
Education Fiscal Services Assistant				Legislative Budget Assistant			
BRANCH							
Chief of Staff's Office							
DIVISION				OFFICE			
Government Affairs Division				Fiscal Policy Office			
CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION (CITY)			
R21	E	0413	174-310-2897-004	Sacramento			
PROBATIONARY PERIOD		TENURE		TIME BASE		BILINGUAL POSITION	
12 Months		Permanent		Full-Time		No	
TELEWORK OPTION		SAFETY SENSITIVE POSITION			CONFLICT OF INTEREST CLASSIFICATION		
Remote-centered		No			Yes		
DIRECTION STATEMENT AND GENERAL DESCRIPTION OF DUTIES							
<p>Under the general supervision of the Director, the Education Fiscal Services Assistant (EFSA) works with the Education Fiscal Services Administrator and Education Fiscal Services Consultant(s) to support a variety of highly sensitive and complex technical analytical assignments related to fiscal policy and budget process, including trailer bill legislation. The EFSA will provide assistance related to K-12 education, school finance, the state budget to the public, the Legislature, the local educational agency, governing board members, administrators, Department of Finance, California Department of Education management and staff, and other state agencies. This position assists with advocating and providing technical assistance and support to establish or change funding relevant to California's child care and PreK-12th grade.</p>							
CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS							
<p>All employees are expected to work cooperatively with others, maintain regular, consistent, predictable attendance, and possess integrity, initiative, dependability and good judgment.</p>							
SUPERVISION BY							
<p>The Education Fiscal Services Assistant is under the general direction of the Director of Government Affairs Division and also supervised by the Education Fiscal Services Administrator.</p>							
SUPERVISORY RESPONSIBILITIES							
N/A							
WORKING CONDITIONS AND PHYSICAL REQUIREMENTS							
<p>This position is eligible for telework in accordance with the Statewide Telework Policy, and will be required to report to the office as needed/required. The successful candidate must reside in California upon appointment. Employee will be expected to sit at a desk for an extended duration, and walk or drive between CDE headquarters and the State Capitol as needed.</p>							

**ESSENTIAL/NON-ESSENTIAL FUNCTIONS**

Relative % of Time Required:   Essential Function  Non-Essential Function

Duties Performed

Review and analyze state and federal legislation, regulatory proposals, budget proposals, legislative counter-proposals, trailer bill legislation, and initiatives that have or may not have a fiscal impact on K–12 education in California and identify any concerns or fiscal impact on proposals. Prepare talking points, with the assistance of the Fiscal Policy Office (FPO), for the SSPI and CDE management for legislative budget and informational hearings. Draft speaking notes and written communication for the SSPI related to his budget priorities as well as education programs. Accurately provide information to the SSPI and CDE management or staff, as well as to the Legislature, DOF and LAO.

Under supervision, consult and Advise LEA governing board members, administrators, DOF, Legislature, Legislative Affairs Office (LAO), CDE management and staff, and other state agencies regarding the budget and school finance issues. Prepare fiscal estimates, schedules, issue memos, reconciliations, and other analyses related to the budget, school finance issues, and fiscal policy issues. Develop methodologies for estimating costs and revenues.

With guidance from the director and the FPO, develop and modify education fiscal policy proposals and strategies for policy implementation. Work with various internal and external groups to obtain solution and agreement on fiscal policy issues. Assist education stakeholders on policy implementation to ensure sound financial management practices.

Relative % of Time Required:   Essential Function  Non-Essential Function

Duties Performed

Provide fiscal assistance to the Legislative, DOF, LEAs, CDE management, and other state agencies and stakeholder groups on issues related to Proposition 98, principal apportionment programs, attendance accounting, local control funding formula, and local property taxes, including proposals for reform affecting these subjects.

Relative % of Time Required:   Essential Function  Non-Essential Function

Duties Performed

Provide fiscal assistance to the Legislature, DOF, LEAs, CDE management, and other state agencies and stakeholder groups on various programs including special education, charter schools, early education and federally funded programs.

Relative % of Time Required: <input type="text" value="10"/>	<input checked="" type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
Duties Performed		
Perform other job-related duties and special projects as required.		

Relative % of Time Required: <input type="text"/>	<input type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
Duties Performed		

Relative % of Time Required: <input type="text"/>	<input type="checkbox"/> Essential Function	<input type="checkbox"/> Non-Essential Function
Duties Performed		

**SPECIAL/ADDITIONAL REQUIREMENTS AND DESIRABLE QUALIFICATIONS**

Knowledge of K-12 finance, practices, principles, and trends in public education, as well as effectively and efficiently manage a staff and program within the resources provided; review and edit written documents; establish and maintain project and departmental priorities; work effectively with administrative personnel in the Department and in other governmental agencies; supervise subordinate staff; and effectively contribute to the Department's affirmative action objectives.

Ability to establish and maintain cooperative relations with local, state, and federal officials and agencies; provide leadership and direction for a program of the Department; work effectively with top administrative personnel in the Department and other agencies; and supervise office staff.

**PERSONAL CONTACTS**

Contact with all levels of CDE staff, including executive leadership, directors, and managers. External contact with legislative staff and members of other state agencies.

**EMPLOYEE ACKNOWLEDGEMENT**

*I have read and understand the duties and requirements listed above, and I am able to perform these duties with or without an accommodation. (If you believe an accommodation may be necessary, or if unsure of a need for an accommodation, inform the hiring supervisor or the Accommodations Coordinator at Accommodations@cde.ca.gov.)*

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE

**MANAGER/SUPERVISOR ACKNOWLEDGEMENT**

*I certify this duty statement represents a current and accurate description of the essential functions of the position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.*

MANAGER/SUPERVISOR NAME	MANAGER/SUPERVISOR SIGNATURE	DATE

HRD C&P ANALYST	HRD APPROVAL DATE	EFFECTIVE DATE	DATE UPLOADED

**This form will be kept in the employee's Official Personnel File.**

Original - Classifications & Pay Office

Copies - Employee and Supervisor