



DUTY STATEMENT

PR LOG #: FR26-275

CIVIL SERVICE CLASSIFICATION				WORKING TITLE	
Education Fiscal Services Consultant					
BRANCH					
Operations and Administration					
DIVISION			OFFICE		
School Fiscal Services			Fiscal Oversight & Support Office		
CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION	
R21	E	0410	174-260-2898-050	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	
DIRECTION STATEMENT AND GENERAL DESCRIPTION OF DUTIES					
Under the direction of the Administrator of the Fiscal Oversight and Support Office, this position works with county offices of education (COEs) to ensure their financial solvency, as well as that of the school districts within their jurisdiction. The position advises and assists local educational agencies (LEAs) in strengthening and improving their fiscal management practices; works closely with high-level school district and COE administrators in addressing and resolving both policy and technical issues affecting the business and financial services of educational agencies; and develops comparative data to identify potential financial difficulties and assist COEs and school districts with local decision-making. The incumbent is considered an expert in education accounting, budgeting, and policies/procedures.					
CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS					
All employees are expected to work cooperatively with others, maintain regular, consistent, predictable attendance, and possess integrity, initiative, dependability and good judgment.					
SUPERVISION BY					
The incumbent reports directly to the Education Fiscal Services Administrator, however, direction and assignments may also come from the Education Fiscal Services Administrator of the Financial Accountability & Information Services Office, the Associate Director, and Director.					
SUPERVISORY RESPONSIBILITIES					
The incumbent does not exercise supervisory duties.					
WORKING CONDITIONS AND PHYSICAL REQUIREMENTS					
May require sitting for long periods of time while using a personal computer, reviewing documents, and testing applications or working on Excel spreadsheets. The work environment may be fast-paced and very detailed. At times, the work may be deadline driven. The position requires flexibility.					

ESSENTIAL/NON-ESSENTIAL FUNCTIONS

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

Duties Performed

Responsible for ensuring the financial solvency of COEs and school districts in single-district counties. This includes conducting a process of in-depth monitoring, annually approving/disapproving annual budgets and interim reports, recommending financial recovery plans and providing assistance as needed, reviewing annual audit reports, and researching and analyzing financial and demographic trends. Communicate and meet with superintendents and school business officials on matters related to financial solvency. Coordinate with the Local Agency System Support Office on approval of COE (and district) Local Control and Accountability Plans (LCAPs), including the evaluation of the budgetary related aspects of the plans. Represent the division and provide technical assistance related to the financial management of COE programs and services in the Statewide System of Support.

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

Duties Performed

Work with high-level school district and COE administrators to ensure that school districts meet their financial obligations and are complying with the requirements of AB 1200, AB 2756, and AB 1840. Analyze the fiscal and management condition of school districts at risk of not maintaining solvency and provide recommendations for improvement. Provide support to administrators and trustees that have been appointed to LEAs that have received emergency loans from the state. Work closely with appointed administrators/trustees in resolving the districts' operational issues as they arise, and identifying new revenue sources and cost containment measures as needed.

Review and prepare written analyses of financial and budgetary reports such as the annual budget and interim reports, annual financial audits, multi year financial recovery plans, proposals, and studies related to district programs including employee compensation, and progress reports prepared by the Fiscal Crisis and Management Assistance Team. Review comments submitted by the County Superintendent on these various products and make recommendations to the Administrator on the reasonable course of action and response. Assist in resolution of audit findings for school districts that have received emergency loans.

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

Duties Performed

Advise and assist LEA administrators in all areas of accounting, budgeting, and reporting, and issues of fiscal accountability and fiscal management practices to improve and make more efficient the fiscal management of schools. This includes acting in a leadership capacity by being at the forefront of new accounting standards promulgated by national standard-setting bodies and working with LEA chief financial officers, Certified Public Accountants, and others to standardize the LEAs' account code structure to reduce the reporting burden on districts and provide more useful data. Work closely with LEAs to properly record accounting transactions using the standardized account code structure (SACS); annually update the California School Accounting Manual consistent with changing laws, accounting standards, and policies; organize, update, and present SACS accounting issues at periodic meetings with LEAs to improve and streamline financial reporting. Participate in the development, testing, and maintenance of the financial reporting system for California's K-12 local educational agencies to ensure that CDE receives reasonable, accurate, and consistent financial data.

Relative % of Time Required: 10	☒ Essential Function ☐ Non-Essential Function
Duties Performed	
Advise and makes recommendations to management on fiscal solvency and management policy, methods, and procedures; draft and analyze legislation relating to these issues; respond to public inquiries related to school finance issues and trends. Collaborate with others in the section, division and department, as needed, to share information and ensure consistent messaging throughout the department. Evaluate and make recommendations to the State Board of Education on requests for waivers of various sections of the California Education Code. Review and prepare written analysis of financial and budgetary reports in response to requests for repayment plans due to fiscal hardship for apportionment significant audit exceptions pursuant to California Education Code 41344.	

Relative % of Time Required: 10	☐ Essential Function ☒ Non-Essential Function
Duties Performed	
Other duties as assigned.	

Relative % of Time Required:	☐ Essential Function ☐ Non-Essential Function
Duties Performed	

SPECIAL/ADDITIONAL REQUIREMENTS AND DESIRABLE QUALIFICATIONS

Knowledge of school administration practices, school district business practices, financial management, staffing, current practices and procedures for the preparation of school budgets, accounts, and records; principles of governmental fund accounting, education program cost accounting, interim financial status reports and year-end expenditure reports; public school law and finance; automated financial management systems and software applications; and general knowledge of other areas of LEA operations.

Ability to interpret data, solve administrative and fiscal problems, and speak and write effectively; establish and maintain cooperative relations with local, state, and federal officials and agencies.

PERSONAL CONTACTS

Contacts with all levels of departmental employees including Directors, Managers, Supervisors, Local Educational Agencies, and other government agencies such as the Department of Finance, State Controller's Office, and the general public.

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

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Duties Performed

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Relative % of Time Required:	10	☒ Essential Function	☐ Non-Essential Function
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Relative % of Time Required:	10	☐ Essential Function	☒ Non-Essential Function
Duties Performed			
Other duties as assigned.			

Relative % of Time Required:		☐ Essential Function	☐ Non-Essential Function
Duties Performed			

SPECIAL/ADDITIONAL REQUIREMENTS AND DESIRABLE QUALIFICATIONS

Knowledge of school administration practices, school district business practices, financial management, staffing, current practices and procedures for the preparation of school budgets, accounts, and records; principles of governmental fund accounting, education program cost accounting, interim financial status reports and year-end expenditure reports; public school law and finance; automated financial management systems and software applications; and general knowledge of other areas of LEA operations.

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DIVISION				OFFICE	
School Fiscal Services				Fiscal Oversight & Support Office	
CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION	
R21	E	3245	174-260-2898-107	Sacramento	
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Relative % of Time Required: ☒ Essential Function ☐ Non-Essential Function

Duties Performed

Develop the mechanisms, tools, policies, and procedures to implement the fiscal accountability aspects of federal laws, regulations, and guidelines applicable to LEAs to ensure the state is meeting its obligation to monitor LEA compliance and/or implement the provisions for more effective and efficient program operations. Additionally, identify fiscal requirements, develop and update maintenance of effort reports, meet and consult with CDE and LEA staff to develop policies, procedures, and report forms, and work with LEAs to implement the requirements.

Relative % of Time Required: 10	☒ Essential Function ☐ Non-Essential Function
Duties Performed	
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ESSENTIAL/NON-ESSENTIAL FUNCTIONS

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

Duties Performed

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