



DUTY STATEMENT

PR LOG #:

CIVIL SERVICE CLASSIFICATION				WORKING TITLE	
Education Fiscal Services Consultant					
BRANCH					
Operations and Administration					
DIVISION				OFFICE	
School Fiscal Services				Principal Apportionment Policy Office A	
CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION	
R21	E	0159	174-260-2898-XXX	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 Education Fiscal Services Administrator, the Education Fiscal Services Consultant (EFSC) assumes a leadership role for the more complex programs funded through the Principal Apportionment Policy Office, including but not limited to the Local Control Funding Formula (LCFF), Special Education (AB 602) Expanded Learning Opportunities Program (ELOP), the Home-to-School Transportation Reimbursement (HTSTR), the Arts and Music in Schools (AMS) program, and the LCFF Equity Multiplier, which provides funding to K-12 local educational agencies (LEA), including school districts, charter schools, and county offices of education.					
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 Principal Apportionment Policy Office A, 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, developing and reviewing documents, analyzing legislation, and testing software applications. 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: 40

☒ Essential Function☐ Non-Essential Function**Duties Performed**

Serve as the subject matter expert in LCFF and/or other assignment areas within the Principal Apportionment Policy Office including, but not limited to, Special Education (AB 602), ELOP, HTSTR, the AMS program and the LCFF Equity Multiplier. The EFSC is required to be knowledgeable and conversant in the mechanics and requirements pertinent to their assignment area(s) and related funding statutes. Incumbent must understand and identify how changes in statutes, policies, and data can affect the calculations required by assignment program to determine an LEA's entitlement and how LEA-level changes impact the state budget. Additionally, the incumbent must analyze proposed legislation related to Principal Apportionment programs and/or other education finance legislation and advise on potential fiscal/programmatic impact to LEAs and other program areas within the department and the State. The incumbent shall develop funding proposals and draft related legislation, collaborate with others in the unit, division, and/or department, as needed, to share information and ensure consistent messaging throughout the department.

Relative % of Time Required: 25

☒ Essential Function☐ Non-Essential Function**Duties Performed**

Communicate with, and provide guidance and training to, LEA administrators, state agencies, legislative staff, and other California Department of Education (CDE) staff on issues pertaining to the calculation and apportionment of LCFF and other Principal Apportionment funds. Verbal guidance may include, but is not limited to: representing the CDE in internal and external meetings with administrators and policymakers, webinars, workshops and trainings. Written communication and guidance may include, but is not limited to: updating apportionment documentation; drafting letters, policy papers and issue memos; and updating frequently asked questions.

Relative % of Time Required: 25

☒ Essential Function☐ Non-Essential Function**Duties Performed**

Take a leadership role in identifying technical issues and problems related to LCFF and other programs within assignment areas. Be responsible for, and/or collaborate with and mentor responsible staff, to ensure data collection forms are consistent with current law, and data reporting instructions and software error checks are appropriate to achieve data integrity. Also be responsible for ensuring that principal apportionment software processing calculations are appropriate, and data validation procedures are sufficient, to bring about the accurate and appropriate allocation of state funds. Responsibilities also include researching laws and regulations to ensure that administrative practices are consistent with legislative policy and direction with regard to the apportionment of state funds.

Relative % of Time Required: 10	☒ Essential Function ☐ Non-Essential Function
Duties Performed	
Develop and document procedures. Keep management apprised of status of assignments and issues/problems in the assignment area. Perform special projects, and assist other staff with critical projects as needed. Perform other job-related duties as required. The incumbent must be able to work both independently and as part of a team, exercise good judgment, employ well-developed writing and analytical skills, use diplomacy and tact, and meet statutory and organizational deadlines.	

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

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

SPECIAL/ADDITIONAL REQUIREMENTS AND DESIRABLE QUALIFICATIONS

Knowledge of: K-12 LEA financial management and fiscal services; public school law and finance; financial and statistical analysis; statewide financial assistance programs for LEAs; statewide legislative processes; and data processing systems, electronic transmission of data, and communications systems.

Ability to: interpret data, solve administrative and fiscal problems, speak and write effectively; establish and maintain cooperative relations with local, state, and federal officials and agencies; provide leadership and direction to LEAs; and work effectively with all levels of staff in the Department and other agencies, exercising tact, resourcefulness and good judgment.

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

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

Original - Classifications & Pay Office

Copies - Employee and Supervisor



DUTY STATEMENT

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Education Fiscal Services Assistant					
BRANCH					
Operations and Administration					
DIVISION				OFFICE	
School Fiscal Services				Principal Apportionment Policy Office A	
CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION	
R21	E	0159	174-260-2897-XXX	Sacramento	
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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 general supervision of the Education Fiscal Services Administrator, the Education Fiscal Services Assistant (EFSA) assumes a working role for the programs funded through the Principal Apportionment Policy Office, including but not limited to the Local Control Funding Formula (LCFF), Special Education (AB 602) Expanded Learning Opportunities Program (ELOP), the Home-to-School Transportation Reimbursement (HTSTR), the Arts and Music in Schools (AMS) program, and the LCFF Equity Multiplier, which provides funding to K-12 local educational agencies (LEA), including school districts, charter schools, and county offices of education.					
CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS					
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SUPERVISION BY					
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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, developing and reviewing documents, analyzing legislation, and testing software applications. 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: 40

☒ Essential Function☐ Non-Essential Function**Duties Performed**

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