California Department of Education
Human Resources Division
HRD-002 (Revised 06/2024)

☐CURRENT
☒PROPOSED

PR LOG #: FR26-322

DUTY STATEMENT

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	5212	174-260-2898-099	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 in the Principal Apportionment Policy Office A, 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 Education Fiscal Services Administrator; however, direction and assignments may also come from the Administrator of Principal Apportionment Policy Office B, 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 is fast-paced, can be demanding, and requires the incumbent to be flexible.

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, other divisions within the CDE, 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

California Department of Education
Human Resources Division
HRD-002 (Revised 06/2024)

☐CURRENT
☒PROPOSED

PR LOG #: FR26-322

DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION	WORKING TITLE
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	5212	174-260-2897-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 general supervision of the Administrator in the Principal Apportionment Policy Office A, 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

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 Education Fiscal Services Administrator; however, direction and assignments may also come from the Administrator of Principal Apportionment Policy Office B, 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 is fast-paced, can be demanding, and requires the incumbent to be flexible.

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 EFSA 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

Identify 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, other divisions within the CDE, 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