

☒ **PROPOSED**



☐ **CURRENT**

DUTY STATEMENT

Note: Shaded area is for Personnel Office use only.

PERSONNEL REQUEST NO.		EFFECTIVE DATE
		March 2, 2020
DIVISION School Fiscal Services Division	POSITION NUMBER (Agency – Unit – Class – Serial) 174-260-2898-067	
UNIT Categorical Allocations and Audit Resolution	POSITION CONTROL NO. 2464	
INCUMBENT Vacant	CLASS TITLE Education Fiscal Services Consultant	
Briefly (1 or 2 sentences) describe the position's organizational setting and major functions.		
Under the direction of the Administrator of the Categorical Allocations and Audit Resolution Office, the consultant will advise the Administrator and provide high-level consultation and technical assistance to local educational agency (LEA) administrators, governing board members, and staff on fiscal issues that are assigned to the office. This position is responsible for addressing a variety of the more sensitive and complex fiscal issues relative to K-12 education funding and school finance. The incumbent must be able to work independently, as well as with a team of consultants, and keep the Administrator apprised of emerging issues and state and federal legislative proposals, law, regulation, and practices.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. (Use additional sheet if necessary)	
60%	<p>Categorical Allocations: Calculate entitlements and compose apportionment letters, notices, schedules, and related documents to apportion funding under Title I, Part A and Part D of the Elementary and Secondary Education Act of 1965, as amended by the No Child Left Behind Act of 2001 (NCLB). Funding, provided to LEAs and totaling over \$1.6 billion, is based on a complex set of rules established in NCLB, requiring the compilation and management of numerous types of data obtained from different sources. Assist in the automation of NCLB apportionment. Provide analytical support for an additional small portfolio of programs, serving as back-up to one or more analysts. Document the steps, timelines, and data requests in the apportionment processes for all assigned programs. Possess a thorough understanding of the data sets used in calculating categorical apportionments including but not limited to the NCLB formula count, census count, California Longitudinal Pupil Achievement Data System enrollment, average daily attendance, free and reduced priced meal data, and charter school survey data, in order to ensure accurate and timely apportionment of funds as required by law, regulations, and policies. Ensure compliance with state and federal laws related to cash management and maintenance of effort requirements, calculation of entitlements, application for, allocation, use and accounting of funds to LEAs and charter schools, and reporting requirements.</p> <p>Possess a thorough understanding of the contents and provisions of the annual state budget act and related legislation as they relate to funding and programs in education, and of the budget and legislative enactment processes. Use initiative to identify and solve problems. Draft legislation, and prepare written analyses of bill proposals, and various correspondence relating to school finance.</p>	
20%	<p>Client Assistance: Consult with and advise CDE managers and staff as well as high-level education fiscal policy makers, superintendents and chief business officers on complex and sensitive fiscal policy issues and processes related to state and federal categorical programs. Respond to inquiries from policy makers, public, and media with regard to categorical program fiscal matters. Provide data and policy analysis requested by management and other CDE staff.</p>	

10%	<p>Support: Prepare legislation, legislative bill analysis, and miscellaneous departmental correspondence relating to school finance and fiscal oversight. Work in group projects involved in developing or revising data management and data collection systems used in or related to the apportionment of state and federal funds.</p>
10%	<p>Other Duties: Other job related duties as assigned.</p> <p><u>Knowledge and abilities:</u></p> <p>Knowledge of school district administration and business practices, and financial management; public school law and finance; statewide financial assistance programs for school districts; Federal and State education laws; state legislative processes; organization, functions, rules and regulations of the California Department of Education (CDE).</p> <p>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, relate to school boards, chief business officials, and superintendents, provide leadership and direction to local educational agencies, and work effectively with top administrative personnel in the Department and other agencies.</p>

To be reviewed and signed by the supervisor and employee:		
Supervisor's statement: <ul style="list-style-type: none"> I have discussed the duties and responsibilities of the position with the employee I have signed and received a copy of the duty statement. 		
SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE 	DATE
Employee's statement: <ul style="list-style-type: none"> I have discussed the duties and responsibilities of the position with my supervisor I have signed and received a copy of the duty statement 		
EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE 	DATE

Distribution: Original: Official Personnel File Copy: Supervisor Copy: Employee Copy: Program File

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DIVISION School Fiscal Services Division		POSITION NUMBER (Agency – Unit – Class – Serial) 174-260-2897-067
UNIT Categorical Allocations and Audit Resolution		POSITION CONTROL NO. 2464
INCUMBENT Vacant		CLASS TITLE Education Fiscal Services Assistant
Briefly (1 or 2 sentences) describe the position's organizational setting and major functions.		
Under the general supervision of the Administrator of the Categorical Allocations and Audit Resolution Office, the assistant will advise the Administrator and provide high-level consultation and technical assistance to local educational agency (LEA) administrators, governing board members, and staff on fiscal issues that are assigned to the office. This position is responsible for addressing a variety of the more sensitive and complex fiscal issues relative to K-12 education funding and school finance. The incumbent must be able to work independently, as well as with a team of consultants, and keep the Administrator apprised of emerging issues and state and federal legislative proposals, law, regulation, and practices.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. (Use additional sheet if necessary)	
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10%	<p>Support: Prepare legislation, legislative bill analysis, and miscellaneous departmental correspondence relating to school finance and fiscal oversight. Work in group projects involved in developing or revising data management and data collection systems used in or related to the apportionment of state and federal funds.</p>
10%	<p>Other Duties: Other job related duties as assigned.</p> <p><u>Knowledge and abilities:</u></p> <p>Knowledge of school district administration and business practices, and financial management; public school law and finance; statewide financial assistance programs for school districts; Federal and State education laws; state legislative processes; organization, functions, rules and regulations of the California Department of Education (CDE).</p> <p>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, relate to school boards, chief business officials, and superintendents, provide leadership and direction to local educational agencies, and work effectively with top administrative personnel in the Department and other agencies.</p>

To be reviewed and signed by the supervisor and employee:		
Supervisor's statement: <ul style="list-style-type: none"> I have discussed the duties and responsibilities of the position with the employee I have signed and received a copy of the duty statement. 		
SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE 	DATE
Employee's statement: <ul style="list-style-type: none"> I have discussed the duties and responsibilities of the position with my supervisor I have signed and received a copy of the duty statement 		
EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE 	DATE

Distribution: Original: Official Personnel File Copy: Supervisor Copy: Employee Copy: Program File