



Education Fiscal Services Administrator

General Instructions

Thank you for your interest in California State civil service employment. The State of California is an Equal Employment Opportunity employer. The Education Fiscal Services Administrator examination will consist of the attached Qualifications Assessment Questionnaire (QAQ) that will be used to evaluate your experience, education, and training supervising staff that provide technical assistance to local education agencies in all areas of fiscal and business management.

The QAQ is the examination and will account for 100% of your score. It is important that you fill out the QAQ completely. Questions without a response will not be scored. Your responses must be an accurate reflection of your experience, education, and training.

In order to apply for this examination, you must submit a complete examination application package. Missing information may delay the processing of your examination.

The following documents comprise a complete examination application package for the Education Fiscal Services Administrator examination:

- Examination/Employment Application (STD. 678): <https://jobs.ca.gov/pdf/std678.pdf>
- Qualifications Assessment Questionnaire and signed Affirmation Statement
- Evidence of completion of the education/license (copies are acceptable)

PLEASE SUBMIT YOUR COMPLETED EXAMINATION APPLICATION PACKAGE TO:

California Department of Education
Examination and Recruitment Office
1430 N Street, Suite 1802
Sacramento, CA 95814
916-319-0857

Upon receipt of your completed examination application package, documents become confidential information and are the property of the California Department of Education, Examination and Recruitment Office. Please notify this office if you have a change of address.

YOUR RESPONSES ARE SUBJECT TO VERIFICATION

All information provided on the state examination/employment application and QAQ is subject to verification at any time during the examination process and/or hiring process.

Anyone who misrepresents their experience, education, and/or training may be subject to one or more of the following actions:

- Removal from the examination process
- Removal from the certification list
- Loss of State employment
- Loss of rights to compete in any future State examinations

Section I - Minimum Qualifications

Items in this section request information about your minimum qualifications and will be used to determine your eligibility to compete in this examination. Please answer each of the following questions.

Education Requirement

1. Do you have an earned master's degree or equivalent in Public or Business Administration or related field?
 Yes No
2. Do you have a valid license authorizing service as a Certified Public Accountant in California?
 Yes No
3. Experience substituted for education requirement (experience used in this manner to meet the education requirement must be in addition to that used to meet the general experience requirement below):
 - a. One year of experience performing professional education duties at a level of responsibility equivalent to that obtained in the class of Education Fiscal Services Assistant, Range B or higher; or,
 Yes No
 - b. Two years of experience in California state service performing fiscal analysis duties at a level of responsibility equivalent to that obtained in the class of Staff Services Manager I or higher; or,
 Yes No
 - c. Two years of experience in a county office of education or school district as chief business officer or director of accounting, budgeting, data processing, business services, or similar administrative function with major responsibility for the preparation or analysis of education budgets, accounts, and records.
 Yes No

Experience Requirement

1. Do you have one year of experience in California state service performing educational fiscal services duties at a level of responsibility equivalent to that obtained in the class of Education Fiscal Services Consultant?
 Yes No
2. Do you have two years of experience in California state service performing educational fiscal services duties at a level of responsibility equivalent to that obtained in the class of Education Fiscal Services Assistant, Range B?
 Yes No
3. Do you have four years of experience in a county office of education or school district as chief business officer or director of accounting, budgeting, data processing, business services, or similar administrative function with major responsibility for the preparation or analysis of education budgets, accounts, and records?
 Yes No

Section II - Specialized Experience and Education

Experience is acceptable only when it is a major part of the whole job and performed for at least 50% of the job duties. Experience which may have been gained as an occasional or incidental aspect of other work is not acceptable.

Please indicate your years of experience in the following areas by selecting the corresponding response. Items without a response will not be scored.

1. Accounting

- 6 months to 1 year of experience
- 1 to 4 years of experience
- 4 or more years of experience

2. Budgeting

- 6 months to 1 year of experience
- 1 to 4 years of experience
- 4 or more years of experience

3. Finance

- 6 months to 1 year of experience
- 1 to 4 years of experience
- 4 or more years of experience

4. Auditing/Monitoring

- 6 months to 1 year of experience
- 1 to 4 years of experience
- 4 or more years of experience

5. Statistics

- 6 months to 1 year of experience
- 1 to 4 years of experience
- 4 or more years of experience

6. Economics

- 6 months to 1 year of experience
- 1 to 4 years of experience
- 4 or more years of experience

7. Government

- 6 months to 1 year of experience
- 1 to 4 years of experience
- 4 or more years of experience

8. Public Policy
- 6 months to 1 year of experience
 - 1 to 4 years of experience
 - 4 or more years of experience
9. Program Policy and Evaluation
- 6 months to 1 year of experience
 - 1 to 4 years of experience
 - 4 or more years of experience
10. Funding Apportionments or Allocations
- 6 months to 1 year of experience
 - 1 to 4 years of experience
 - 4 or more years of experience
11. Business/Governmental Law
- 6 months to 1 year of experience
 - 1 to 4 years of experience
 - 4 or more years of experience

Please indicate your postsecondary education in the following areas by selecting the corresponding column.

1. Finance, Budgeting, Accounting, or Auditing
- 6 or more semester units
 - 9 or more semester units
2. Statistics or Economics
- 6 or more semester units
 - 9 or more semester units
3. Government, Public Policy, or Program Policy
- 6 or more semester units
 - 9 or more semester units
4. Business or Government Law
- 6 or more semester units
 - 9 or more semester units

Section III - Task Experience

Using the rating scale provided below, rate your level of proficiency performing each Task by selecting the corresponding column.

Proficiency Level

- I have extensive education, training, or experience in this area and am technically proficient to the point where I can perform this task effectively and independently.
- I have education, training, or experience in this area and with minimal guidance or further training could perform this task effectively and independently.
- I have little or no education, training, or experience in this area and would need guidance and training to perform this task effectively.

Respond to each of the following statements by indicating how the statement applies to you. Items without a response will not be scored.

1. Review work products for accuracy and completeness to ensure compliance with federal and state policies, laws, and regulations.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
2. Ensure fiscal solvency and financial accountability of governmental agencies.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
3. Provide technical assistance on accounting, budgeting, reporting, and auditing to ensure accurate financial reporting and fiscal solvency.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
4. Develop tools, processes, and procedures to ensure fiscal accountability and accurate data reporting compliant with federal and state laws, regulations, and guidelines.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
5. Communicate effectively to establish and maintain cooperative relationships with local, state, federal officials, and agencies.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience

6. Identify and resolve complex funding issues to ensure that funds are allocated appropriately in accordance with laws, regulations, and other authoritative guidelines.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
7. Direct the design, implementation, and oversight of data reporting systems and internal tools, such as the allocation of funds, accounting and budgetary practices or monitor fiscal solvency, to ensure compliance with laws and regulations.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
8. Prepare comprehensive and complex written documents on fiscal matters.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
9. Develop funding proposals and provide technical assistance related to legislation regarding state and federal funding issues.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
10. Propose, review, and analyze legislation to determine its impact and resource requirements, and make recommendations.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
11. Direct staff in helping local governmental agencies that are experiencing financial difficulties to ensure they maintain fiscal solvency.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
12. Direct a process of in-depth monitoring, reviewing, and tracking annual budgets, interim and year-end financial reports, and audit reports.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience

13. Represent the organization and provide guidance related to fiscal issues consistent with statute and organizational policies.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
14. Act as your organization's representative on fiscal policy and funding issues to ensure consistency, timeliness, and compliance with laws and regulations.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
15. Assess fiscal reporting practices of your organization or local governmental agencies to ensure fiscal accountability in accordance with federal and state laws.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
16. Develop and direct the implementation of software systems to ensure the integrity of data collected from local governmental agencies are accurate and consistent with statute and reporting guidelines.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
17. Prepare and present recommendations to your organization and/or local governmental agencies on fiscal matters.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience

Section IV - Task Experience/Supervision

Using the rating scale provided below, rate your level of proficiency performing each Task by selecting the corresponding column.

Proficiency Level

- I have extensive education, training, or experience in this area and am technically proficient to the point where I can perform this task effectively and independently.
- I have education, training, or experience in this area and with minimal guidance or further training could perform this task effectively and independently.
- I have little or no education, training, or experience in this area and would need guidance and training to perform this task effectively.

Respond to each of the following statements by indicating how the statement applies to you. Items without a response will not be scored.

1. Provide leadership, managerial direction and/or supervision of multidisciplinary staff.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
2. Advise and make recommendations to leadership on sensitive fiscal matters to help arrive at the optimal outcome.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
3. Plan, coordinate, and/or assign work to staff in order to accomplish objectives consistent with organizational goals and objectives.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
4. Recognize the accomplishments and achievements of staff in order to foster employee morale and productivity using a variety of communication tools such as meetings, emails, video calls, employee performance reviews, etc.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
5. Provide direction and oversight in the allocation, management, and/or use of public funds.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience

6. Supervise the development and production of a variety of reports for making management decisions for various federal and state programs.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
7. Hire new employees into the organization to accomplish organizational goals and objectives.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
8. Provide leadership by identifying administrative impediments and developing implementation strategies, and protocols to ensure accurate and timely work products.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
9. Manage, oversee, and/or approve annual budgets and budget revisions to maximize available funding.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
10. Provide periodic feedback to employees and complete timely performance evaluations, and as necessary any required personnel actions.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
11. Provide resources (e.g., coaching, training and collaboration) to staff in order to meet job expectations.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
12. Establish and implement consistent performance standards and expectations.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience

Section V - Knowledge Assessment

Using the rating scale below, rate your level of knowledge in accordance with your experience. In responding to each statement you may refer to your experience, internship, or volunteer work.

Definition of Levels:

Extensive: I possess expert knowledge to the extent that I have effectively performed tasks in the most difficult and complex situations and I have instructed others on specific aspects of this knowledge.

Moderate: I possess sufficient knowledge that has allowed me to perform tasks successfully and I have applied it to an actual job.

Limited: I possess some knowledge but may require additional instruction to apply this knowledge effectively.

None: I do not possess knowledge in this area.

Respond to the following statements by indicating how the statement applies to you. Items without a response will not be scored.

1. Knowledge of the principles, practices, and trends in public and/or business administration relating to fiscal services for the effective and efficient management of resources.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

2. Knowledge of current practices and procedures for the preparation of budgets, accounts, and records to ensure governmental agencies employ sound fiscal management practices, including but not limited to accounting and budgeting.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

3. Knowledge of public administration to develop, implement, and evaluate fiscal programs, policies, and procedures.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

4. Knowledge of automated financial management systems and software applications to coordinate the development and maintenance of data reporting software.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

5. Knowledge of program evaluation including the methods of financial and statistical analysis to evaluate the impact and effectiveness of programs, business processes, and policies.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

6. Knowledge of the principles in personnel management (e.g., staff development, training and supervision) in order to manage staff resources.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

7. Knowledge of the Office of Equal Opportunity (OEO) regulations and objectives to promote the OEO policies and goals in making hiring, employee decisions, and providing a harassment free work environment.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

8. Knowledge of hiring practices that promote diversity, equity inclusion and practices of employee development and training.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

9. Ability to accurately interpret data to perform research and analytical studies.
- Level of Knowledge:
- Extensive
 - Moderate
 - Limited
 - None
10. Ability to analyze situations accurately and take effective action to facilitate the work of the organization.
- Level of Knowledge:
- Extensive
 - Moderate
 - Limited
 - None
11. Ability to effectively interpret and explain information to a variety of audiences to facilitate a common understanding of fiscal policies, practices and procedures.
- Level of Knowledge:
- Extensive
 - Moderate
 - Limited
 - None
12. Ability to work collegially to accomplish cooperative projects.
- Level of Knowledge:
- Extensive
 - Moderate
 - Limited
 - None
13. Ability to communicate effectively to convey information to stakeholders, exercise tact, resourcefulness, and judgment with all groups contacted in the work to establish effective working relationships.
- Level of Knowledge:
- Extensive
 - Moderate
 - Limited
 - None

14. Ability to develop sound policy recommendations and solve administrative and fiscal problems, by reviewing, researching, and responding to inquiries.

Level of Knowledge:

- Extensive
 Moderate
 Limited
 None

15. Ability to assume leadership and exercise creativity in the work assigned to facilitate the work of the organization.

Level of Knowledge:

- Extensive
 Moderate
 Limited
 None

16. Ability to review and edit written documents to ensure accuracy and consistency with established guidelines.

Level of Knowledge:

- Extensive
 Moderate
 Limited
 None

17. Ability to plan, direct, and supervise staff to ensure project and departmental priorities are maintained and the work product meets quality, quantity, and timeliness standards.

Level of Knowledge:

- Extensive
 Moderate
 Limited
 None

18. Skill to lead effectively to develop multidisciplinary staff and build a strong team culture.

Level of Knowledge:

- Extensive
 Moderate
 Limited
 None

19. Skill to proficiently use Microsoft Office Suite (Word, PowerPoint, Excel, Outlook, Teams) for business needs.

Level of Knowledge:

- Extensive
 Moderate
 Limited
 None

Section VI - Degrees and Licenses

Please indicate your education and/or current license by selecting the appropriate box and provide a copy of your diploma/license. Select all that apply.

Degrees

Ph.D in related field, Ed.D

Type/Major:

Professional Licenses

Certified Public Accountant

Other Type/Title:

Affirmation Statement

THIS AFFIRMATION MUST BE COMPLETED

Government Code Section 18935:

- a. The department or a designated appointing power may refuse to examine, or after examination may refuse to declare as eligible, or may withhold or withdraw from an eligible list, before the appointment, anyone who meets any of the following criteria:
 1. Lacks any of the requirements for the examination or position for which he or she applied.
 2. Has been dismissed from any position for any cause that would be a cause for dismissal from state service.
 3. Has resigned from any position not in good standing in order to avoid dismissal.
 4. Has misrepresented himself or herself in the application or examination process, including permitting another person to complete or attempt to complete a portion of the examination on his or her behalf.
 5. Has been found to be unsuited or not qualified for employment pursuant to rule.
- b. The remedies provided in this section are not exclusive and shall not prevent the board, department, or appointing power from taking additional actions pursuant to Chapter 10 (commencing with Section 19680).

I hereby certify and understand that the information provided by me on this questionnaire is true and complete to the best of my knowledge and contains no willful misrepresentation or falsifications. I also understand that if it is discovered that I have made any false representations, I will be removed from the list resulting from this examination and may not be allowed to compete in future examinations for State employment. If it is discovered that I have made any false representations after being appointed to a position, I may have adverse action taken against me, which could result in dismissal.

Signature: _____

Date: _____

Name (Printed): _____

Home Phone Number: _____

Work Phone Number: _____