

Education Fiscal Services Consultant

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 Consultant examination will consist of the attached Qualifications Assessment Questionnaire (QAQ) that will be used to evaluate your experience, education, and training providing technical assistance to public and/or private entities 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 Consultant 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 required education/credential/license/certificate (copy is 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 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 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 budgets, accounts, and records.
 Yes No

Experience Requirement

1. Do you have one year of experience in California state service performing fiscal services duties at a level of responsibility equivalent to an Education Fiscal Services Assistant, Range B?
 Yes No
2. Do you have two years of experience in California state service performing fiscal analysis duties at a level of responsibility equivalent to that of a Staff Services Manager I or higher?
 Yes No
3. Do you have two years of experience 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 budgets, accounts, and records.
 Yes No

Section II - Specialized Experience and Education

Please indicate your length of experience in the following areas by placing selecting the appropriate response in the corresponding column.

Do not report experience which may have been gained as an occasional or incidental aspect of the job.

1. Accounting

- 6 months to 1 year of experience
- 1 to 3 years of experience
- 3 or more years of experience

2. Budgeting

- 6 months to 1 year of experience
- 1 to 3 years of experience
- 3 or more years of experience

3. Finance

- 6 months to 1 year of experience
- 1 to 3 years of experience
- 3 or more years of experience

4. Auditing

- 6 months to 1 year of experience
- 1 to 3 years of experience
- 3 or more years of experience

5. Statistics

- 6 months to 1 year of experience
- 1 to 3 years of experience
- 3 or more years of experience

6. Economics

- 6 months to 1 year of experience
- 1 to 3 years of experience
- 3 or more years of experience

7. Government

- 6 months to 1 year of experience
- 1 to 3 years of experience
- 3 or more years of experience

8. Public Policy
- 6 months to 1 year of experience
 - 1 to 3 years of experience
 - 3 or more years of experience
9. Program Policy and Evaluation
- 6 months to 1 year of experience
 - 1 to 3 years of experience
 - 3 or more years of experience
10. Funding Apportionments or Allocations
- 6 months to 1 year of experience
 - 1 to 3 years of experience
 - 3 or more years of experience
11. Business/Governmental Law
- 6 months to 1 year of experience
 - 1 to 3 years of experience
 - 3 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
- 3 or more semester units
 - 6 or more semester units
2. Statistics or Economics
- 3 or more semester units
 - 6 or more semester units
3. Government, Public Policy, or Program Policy
- 3 or more semester units
 - 6 or more semester units
4. Business or Government Law
- 3 or more semester units
 - 6 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. Work closely with public and/or private entities to ensure understanding of the fiscal requirements of state and federal programs.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
2. Provide fiscal guidance and technical assistance to public and/or private entities to ensure compliance.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
3. Monitor and review public and/or private entities fiscal and program records.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
4. Prepare oral or written reports of work accomplished to management.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
5. Incorporate a leadership role in identifying technical issues and problems related to implementation of state and federal programs.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience

6. Research laws and regulations to ensure that administrative practices are consistent with legislative policy.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
7. Advise and assist the public and/or private entities in strengthening and improving program fiscal management practices in the areas of program accounting, budgeting, and reporting.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
8. Work closely with public and/or private entities to identify fiscal training, guidance and technical assistance needs.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
9. Review and prepare fiscal analysis of financial reports.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
10. Develop and present trainings to provide technical assistance in the fiscal regulatory requirements of entities receiving state and federal funding.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
11. Develop and deliver presentations at workshops, conferences and meetings, using various modes of delivery including technology and other media, in order to facilitate a common understanding of fiscal policies, practices, and procedures in accordance with laws, regulations, and other authoritative guidelines.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
12. Assist in implementing state and federal guidelines and requirements as outlined in statute.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience

13. Provide expert assistance to public and/or private entities on a variety of sensitive and complex fiscal issues relating to audits and state and federal categorical apportionments.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
14. Assist in program audits as it relates to state and federal funds and provide documentation on compliance of the state and federal programs.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
15. Develop the mechanisms, tools, policies, and procedures to implement the fiscal accountability aspects of federal laws, regulations, and guidelines applicable to public and/or private entities.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
16. Monitor budgets, approving/disapproving annual budgets and interim reports, reviewing annual audit reports, and researching and analyzing financial and demographic trends.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
17. Communicate with, and provide guidance and training to, public and/or private entities administrators, state agencies, and legislative staff.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
18. Read and interpret legislation and identify impacts.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
19. Work closely with public and/or private entities to properly record accounting transactions.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience

20. Consult with and advise high-level policy makers on complex and sensitive fiscal policy issues and processes to ensure adherence to overarching state and federal laws.

- I have extensive experience
- I have minimal experience
- I have little or no experience

21. Review the budgeted revenue and expenditure or other budgeted expenditures are reasonable.

- I have extensive experience
- I have minimal experience
- I have little or no experience

Section IV - 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. Principles, practices, and trends in public elementary and secondary education relating to fiscal services practices in local educational agencies.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

2. Current practices and procedures for the preparation of school budgets, accounts, and records to ensure sound accounting and budgeting practices..

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

3. Public-school law and finance to develop, implement, and evaluate fiscal programs, policies, and procedures.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

4. 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. 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. Trends in the area of business and financial management.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

7. Work simplification techniques to promote effective and efficient use of available resources.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

8. Statewide financial programs.
Level of Knowledge:
 Extensive
 Moderate
 Limited
 None
9. Fiscal administrative practices.
Level of Knowledge:
 Extensive
 Moderate
 Limited
 None
10. Federal and State education laws.
Level of Knowledge:
 Extensive
 Moderate
 Limited
 None
11. Generally Accepted Accounting principles (GAAP) to ensure financial records and statements are in compliance with GAAP.
Level of Knowledge:
 Extensive
 Moderate
 Limited
 None
12. Skill to facilitate workgroups to coordinate fiscal efforts.
Level of Knowledge:
 Extensive
 Moderate
 Limited
 None
13. Skill to formulate procedures to implement laws or other guidance.
Level of Knowledge:
 Extensive
 Moderate
 Limited
 None

14. Skill to proficiently use of Microsoft Office Suite (Word, PowerPoint, Excel, Outlook), strong Excel skills including common math functions, formula syntax and nesting formulas for business needs.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

15. Ability to solve administrative and fiscal problems.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

16. Ability to communicate effectively both verbally and in writing to various audiences.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

17. Ability to analyze situations accurately and take effective action to facilitate work.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

18. 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

19. Ability to work collegially to accomplish cooperative assignments.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

20. Ability to assume leadership and exercise creativity in the work assigned.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

21. Ability to approach problem solving with a broad perspective to be able to present multiple solutions.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

22. Ability to learn quickly and adapt to a fast-paced environment.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

23. Ability to work independently and take initiative with minimal direction.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

24. Ability to be detail oriented to ensure accuracy in work product.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

25. Ability to establish effective working relations by exercising the use of tact, resourcefulness, and sound judgement with a variety of diverse groups.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

26. Ability to respond effectively to public inquiries by email or phone and in a timely manner.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

27. Ability to manage multiple projects, maintain high standards and meet project deadlines.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

28. Ability to produce work assignments that meet or exceed expectations.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

29. Ability to create detailed action plans to identify roles and responsibilities for major projects.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

30. Ability to organize and schedule effectively in order to complete tasks.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

31. Ability to create novel solutions to complex problems.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

32. Ability to research and analyze education and fiscal issues in order to provide recommendations to management and other education agencies.

Level of Knowledge:

- Extensive
- Moderate
- Limited
- None

Section V - 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

Type/Major:

Professional Licenses

Certified Public Accountant

- Yes No

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: _____