



Education Fiscal Services Assistant

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 Assistant 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 department staff and local school officials 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 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 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 may be substituted for the education requirement.
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 may be substituted for the education requirement.
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 may be substituted for the education requirement.
Yes No

Experience Requirement

1. Do you have one year of experience in accounting, budgeting, data processing, business services, or similar administrative function with major responsibility for the preparation or analysis of budgets, accounts, and records? Experience applied toward this pattern must be at a level of responsibility equivalent to that of an Associate Governmental Program Analyst in state service.
Yes No

Section II - 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. Consult with, advise, and assist local educational agencies (LEA), other institutions of education, and the public on matters relating to finance, fiscal management, and financial accountability.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
2. Review, research, and respond to inquiries regarding fiscal matters in order to resolve issues and provide guidance.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
3. Develop and deliver presentations at workshops, conferences and meetings.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
4. Prepare recommendations on fiscal matters and policies.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience
5. Provide support at high level policy meetings, committees, conferences, legislative hearings, and appeals on matters relating to finance.
 - I have extensive experience
 - I have minimal experience
 - I have little or no experience

6. Organize, plan, and/or participate in meetings of workgroups, task forces, committees, and other forums to collect and convey information or coordinate fiscal efforts and services.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
7. Organize, plan, and/or participate in meetings of workgroups, task forces, committees, and other forums to collect and convey information or coordinate fiscal efforts and services.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
8. Monitor an entity's fiscal condition throughout the year to ensure ongoing solvency.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
9. Provide guidance and direction to entities at risk of insolvency to restore them to fiscal health.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
10. Perform required oversight to ensure adequate resolution of an entity's audit findings in accordance with laws, regulations, and established procedures.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
11. Develop and implement data reporting systems.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
12. Develop or update manuals, policy documents, and other written guidance to ensure fiscal data is reported accurately and is consistent with changing laws and policies.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience

13. Develop meaningful and comparative fiscal data for dissemination to policy makers, and other interested parties to facilitate informed decision making and an understanding of finance.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
14. Identify and resolve complex funding issues to ensure that funds are allocated appropriately.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
15. Monitor departmental practices related to allocation of federal funds to ensure compliance with federal laws, rules, and regulations.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
16. Analyze and interpret proposed or enacted legislation and make recommendations as needed.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
17. Consult with and advise leadership on complex fiscal policy issues and processes.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
18. Develop fiscal policy proposals or procedures for consideration by high-level decision makers.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
19. Analyze and forecast the effects of finance and fiscal policy issues to provide information or tools for decision making.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience
20. Formulate strategies and develop policies and procedures in order to implement laws, regulations, and other authoritative guidance relating to finance, fiscal management, and financial accountability.
- I have extensive experience
 - I have minimal experience
 - I have little or no experience

Section III - Knowledge and Ability 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 each of 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 (LEA).
 - Extensive
 - Moderate
 - Limited
 - None
2. Methods of financial and statistical analysis.
 - Extensive
 - Moderate
 - Limited
 - None
3. Trends in the area of business and financial management.
 - Extensive
 - Moderate
 - Limited
 - None
4. Work simplification techniques.
 - Extensive
 - Moderate
 - Limited
 - None

5. Accurately Interpret Data.
- Extensive
 - Moderate
 - Limited
 - None
6. Communicate effectively to convey information to stakeholders.
- Extensive
 - Moderate
 - Limited
 - None
7. Analyze situations accurately and take effective action.
- Extensive
 - Moderate
 - Limited
 - None
8. Effectively interpret and explain information to a variety of audiences.
- Extensive
 - Moderate
 - Limited
 - None
9. Work collegially to accomplish cooperative projects.
- Extensive
 - Moderate
 - Limited
 - None
10. Exercise tact, resourcefulness and judgment with all groups contacted in the work.
- Extensive
 - Moderate
 - Limited
 - None

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: _____