# 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 in the Department of Education 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 K-12 finance and 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
   - ☐ 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. Management Information Systems
    - ☐6 months to 1 year of experience
    - ☐1 to 4 years of experience
    - ☐4 or more years of experience
11. Funding Apportionments or Allocations
    - ☐6 months to 1 year of experience
    - ☐1 to 4 years of experience
    - ☐4 or more years of experience
12. 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. Management Information Systems
   - ☐6 or more semester units
   - ☐9 or more semester units
5. 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, research and respond to inquiries regarding educational fiscal matters to resolve issues and provide guidance.

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

2. Speak to state and regional associations, district and county superintendents, and chief business officers to help ensure informed decision making by providing technical and policy advice, instruction, and analysis.

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

3. Advise and make recommendations to high-level decision makers on sensitive fiscal matters.

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

4. Provide consultation, advice, and assistance to local educational agencies, other institutions of education, and the public on matters relating to school finance, fiscal management, and financial accountability to facilitate delivery of K-12 education.

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

5. Prepare comprehensive and complex written documents on fiscal matters that effect change or communicate information.

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

6. Serve as a representative at high level policy meetings, committees, conferences, legislative hearings, and appeals on matters relating to education finance to formulate strategies for policy implementation.

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

7. Consult with and advise high-level policy makers on complex and sensitive fiscal policy issues and processes.

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

8. Formulate strategies and develop policies and procedures in order to implement laws, regulations, and other authoritative guidelines relating to school finance, fiscal management, and financial accountability.

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

9. Stay current on fiscal educational trends and relevant changes related to school district accounting, budgeting, and reporting requirements to improve efficiency and overall effectiveness.

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

10. Identify and resolve complex funding issues to ensure funds are appropriately allocated to local educational agencies.

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

11. Monitor funding activity and maintain supporting funding documentation to ensure accurate and timely accounting or allocation of funds in accordance with state and federal law.

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

12. Develop and deliver presentations at workshops, conferences and meetings, using various modes of delivery including technology and other media.

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

13. Convene and facilitate meetings of workgroups, task forces, and committees 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

14. Direct the design, implementation, and oversight of data reporting systems and internal tools to ensure the appropriate allocation of funds, facilitate appropriate accounting and budgetary practices, and monitor fiscal solvency.

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

15. Plan, assign, and supervise staff in planning, conducting, and evaluating on-site and on-line fiscal monitoring reviews of entities receiving federal funds.

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

16. Resolve fiscal program non-compliance findings and the actions required to implement corrections to ensure compliance with state and federal guidelines.

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

17. 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

18. Analyze and interpret proposed or enacted legislation and make recommendations to facilitate the work of local educational agencies.

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

19. Manage and oversee a program's annual budget including budget change proposals, and budget revisions to maximize available funding.

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

20. Speak to legislators and legislative staff and testify before Legislative Committees to help resolve legislative or budget issues.

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

21. Analyze and forecast the effects of education 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

22. Review and analyze legislation, to determine its impact and resource requirements, and make recommendations related to educational fiscal matters.

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

23. Develop education fiscal policy proposals or procedures for consideration by high-level decision makers to facilitate the work of local educational agencies and the organization.

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

24. Develop meaningful and comparative fiscal data for dissemination to local educational agencies, policy makers, and other interested parties to facilitate informed decision making related to K-12 education finance.

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

25. Monitor practices related to allocation of federal funds to ensure compliance with federal laws, rules, and regulations (e.g., cash management, maintenance of effort, calculation and allocation of entitlements, and reporting).

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

26. Prepare and present recommendations to high-level decision makers on local educational agencies fiscal matters to assist them in making informed decisions.

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

27. Communicate with state agency and legislative staff, local educational agencies, school boards and the public on both controversial and routine school district reorganization proposals.

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

28. Provide guidance and direction to local educational agencies at risk of insolvency to restore them to fiscal health.

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

29. Perform required oversight to local educational agencies to ensure adequate resolution of audit findings.

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

30. Oversee monitoring of local educational agencies' fiscal condition throughout the year to ensure their ongoing solvency.

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

31. Oversee and facilitate progress of local educational agencies in state receivership to ensure their return to fiscal solvency.

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

32. Attend and participate in meetings and work groups to obtain or provide information to meet desired outcome or objective for organization.

    ☐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. Facilitate the hiring process for new employees by conducting interviews, evaluating and recommending candidates.

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

2. Establish and implement consistent performance standards and expectations to meet job requirements.

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

3. Plan, coordinate, and assign work to staff to provide quality services and to achieve operational efficiency.

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

4. Provide training and oversight to staff to ensure standardized application of policies and procedures.

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

5. Manage program operations by maintaining program budgets, supervise and approve work activities, and review and approve travel and leave time for staff.

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

6. Provide resources (e.g., coaching, training, etc.) to staff in order to meet job expectations.
   - ☐ I have extensive experience
   - ☐ I have minimal experience
   - ☐ I have little or no experience
7. Review, edit, and approve work products for accuracy, completeness, and timeliness.
   - ☐ I have extensive experience
   - ☐ I have minimal experience
   - ☐ I have little or no experience
8. Encourage and support staff to independently take responsibility for developing solutions to work related problems.
   - ☐ I have extensive experience
   - ☐ I have minimal experience
   - ☐ I have little or no experience
9. Recognize the accomplishments and achievements of staff in order to foster employee morale and productivity.
   - ☐ I have extensive experience
   - ☐ I have minimal experience
   - ☐ I have little or no experience
10. Evaluate employee performance by completing performance evaluations/probationary reports and providing periodic feedback to aid in their professional development.
    - ☐ I have extensive experience
    - ☐ I have minimal experience
    - ☐ I have little or no experience
11. Document substandard performance to correct, improve, or address employee performance or behavior to resolve problems in a timely manner.
    - ☐ I have extensive experience
    - ☐ I have minimal experience
    - ☐ I have little or no experience
12. Apply basic mediation and negotiation techniques to effectively and appropriately approach complex situations and circumstances that require compromise or concession from one or more involved parties.
    - ☐ I have extensive experience
    - ☐ I have minimal experience
    - ☐ I have little or no experience
13. Provide leadership to staff by identifying administrative impediments and developing formulas, 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

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

   Level of Knowledge:

   ☐Extensive
   ☐Moderate
   ☐Limited
   ☐None

2. Operation of schools, districts, and county offices of education to evaluate fiscal programs, policies, and procedures to assist local educational agencies.

   Level of Knowledge:

   ☐Extensive
   ☐Moderate
   ☐Limited
   ☐None

3. Federal and state education laws to evaluate fiscal programs, policies, and procedures to assist local educational agencies.

   Level of Knowledge:

   ☐Extensive
   ☐Moderate
   ☐Limited
   ☐None

4. Principles in personnel management in order to manage staff.

   Level of Knowledge:

   ☐Extensive

   ☐Moderate

   ☐Limited

   ☐None

5. Current practices and procedures for the preparation of school budgets, accounts, and records.

   Level of Knowledge:

   ☐Extensive

   ☐Moderate

   ☐Limited

   ☐None

6. California public and private school system to evaluate fiscal programs, policies, and procedures to assist local educational agencies.

   Level of Knowledge:

   ☐Extensive

   ☐Moderate

   ☐Limited

   ☐None

7. Principles, practices, and trends in public elementary and secondary education relating to fiscal services.

   Level of Knowledge:

   ☐Extensive

   ☐Moderate

   ☐Limited

   ☐None

8. Statewide financial programs for local educational agencies.

   Level of Knowledge:

   ☐Extensive

   ☐Moderate

   ☐Limited

   ☐None

9. Areas of local educational agency operations including educational programs, transportation, staffing, administrative organization structure, unifications, territorial transfers, and annexations.

   Level of Knowledge:

   ☐Extensive

   ☐Moderate

   ☐Limited

   ☐None

10. School administrative practices to assist local educational agencies in the effective and efficient management of their resources.

    Level of Knowledge:

    ☐Extensive

    ☐Moderate

    ☐Limited

    ☐None

11. California Department of Education's rules and regulations.

    Level of Knowledge:

    ☐Extensive

    ☐Moderate

    ☐Limited

    ☐None

12. A supervisor's responsibility for promoting equal employment opportunity in hiring, employee development and promotion and for maintaining a work environment that is free of discrimination and harassment.

    Level of Knowledge:

    ☐Extensive

    ☐Moderate

    ☐Limited

    ☐None

13. 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

14. Principles of governmental fund accounting to ensure local educational agencies apply sound accounting and budgeting practices.

    Level of Knowledge:

    ☐Extensive

    ☐Moderate

    ☐Limited

    ☐None

15. Trends in business and financial management to ensure local educational agencies employ sound fiscal practices.

    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

☐ Associate Degree Major: _____

☐ Bachelor's Degree Major: _____

☐ Master's Degree Major: _____

☐ Doctorate Degree 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: _____