



FINANCIAL AND PERFORMANCE EVALUATOR I, DEPARTMENT OF FINANCE

OPEN EXAMINATION

• AN EQUAL OPPORTUNITY EMPLOYER • COMMITTED TO A DRUG-FREE STATE WORKPLACE •

FINAL FILING DATE

July 3, 2024

Applications (STD. 678, Examination / Employment Application, Rev. 7-19) sent via mail must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered, received via interoffice mail, or e-mailed after the final filing date may not be accepted.

Dates printed on Mobile Bar Codes, such as the Quick Response (QR) Codes available at the United States Postal Service (USPS), are not considered Postmark dates for the purpose of determining timely filing of an application. It is not recommended to use tracking postcard PS Form 3811, Domestic Return Receipt, as this may cause a delay in the processing of your application. It is the applicant's responsibility to submit their application on time and to ensure the envelope is postmarked.

HOW TO APPLY

Examination Applications (STD. 678) are available at the California Department of Human Resources (CalHR) Job Center, local offices of the Employment Development Department, and on the Internet. (**see online link at the beginning of this section**)

You may submit your examination application using one of the following three methods:

1. E-mail your application to jobs@dof.ca.gov.
2. Via mail to the exact address below.
3. In person at the address below during regular business hours (8:00 a.m. to 5:00 p.m.).

Department of Finance
Human Resources Office
ATTN: Nguyet Nguyen
915 L Street, Suite 1235
Sacramento, CA 95814

DO NOT SUBMIT APPLICATIONS TO THE CALHR. AT THIS TIME THE DEPARTMENT OF FINANCE DOES NOT ACCEPT APPLICATIONS FOR EXAMINATIONS ONLINE. ALL APPLICATIONS MUST INCLUDE A CURRENT VALID E-MAIL ADDRESS AS EXAMINATION NOTICES WILL BE SENT VIA E-MAIL.

All application (STD. 678) forms/résumés must include: employment history "from" and "to" dates (month/day/year), time base, hours per week, civil service title/job classification, duties performed, and range if applicable. Application (STD. 678) forms received without this information may be rejected.

It is the responsibility of all applicants to provide complete and detailed descriptions of qualifying experience to substantiate minimum qualifications. This information is critical in determining acceptance into any examination. Please also include the following:

1. **UNOFFICIAL TRANSCRIPTS.**
2. **COMPLETE AND DETAILED DESCRIPTIONS OF QUALIFYING EXPERIENCE INCLUDING THE LIST OF QUALIFYING ACCOUNTING COURSES AS DESCRIBED IN THE MINIMUM QUALIFICATION SECTION BELOW.**

SPECIAL TESTING ARRANGEMENTS

Applicants with a disability who are requesting special testing arrangements shall mark the appropriate box in item number 10 on the application. Applicants will be contacted regarding specific arrangements.

SALARY RANGE

FINANCIAL AND PERFORMANCE EVALUATOR I

Range A \$4,341 - \$5,607/month
Range B \$5,372 - \$7,062/month

*Salaries shown do not include a Hiring Above Minimum and up to a 10% Recruitment and Retention Pay Differential

Note: **Department of Finance offers attest experience required for CPA licensure as well as a professional certificate bonus of \$4,800 paid over three years after passing all four parts of the CPA exam.**

WHO SHOULD APPLY

This is an OPEN examination for persons who meet the minimum qualifications listed below and are interested in the position of Financial and Performance Evaluator I. Current employment with the State of California is not required. All positions exist in Sacramento, California.

ELIGIBLE LIST INFORMATION

An open, non-promotional eligible list will be established for the Department of Finance. Names of successful competitors will be merged onto the list in order of final scores regardless of the date eligibility is established. Eligibility expires 12 months after it is established. Once you have taken this examination, you may not retake it for 12 months. Applicants must then retake the examination to reestablish eligibility.

REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

All applicants must meet the experience and/or education requirements as stated on this bulletin to be accepted into the examination. Your signature on your application indicates that you have read, understood, and possess the qualifications required.

Qualifying experience may be combined on a proportionate basis if the requirements stated below include more than one pattern and are distinguished as "Either I," "Or II," "Or III" etc. For example, candidates possessing qualifying experience amounting to 50% of the required time of Pattern I, and additional experience amounting to 50% of the required time of Pattern II, may be admitted to an examination as meeting 100% of the overall experience requirement.

Applicants must meet the experience/education requirements by the final filing date.

MINIMUM QUALIFICATIONS

All Levels:

Education Requirement: A four-year college degree from an accredited institution. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

FINANCIAL AND PERFORMANCE EVALUATOR I, DEPARTMENT OF FINANCE

Either I

An undergraduate or graduate degree from an accredited institution and completion of a minimum of 12 semester units in accounting (excluding accounting courses in tax, real estate, human resources, report writing, and marketing). These courses can be taken at either undergraduate or graduate levels. Successful completion of the State Fund Accounting Course administered by the Department of Finance, shall receive credit for three semester hours toward the required accounting courses.

Or II

Two years of increasingly responsible professional experience in accounting or auditing experience, which shall have included the preparation of reports and the presentation of recommendations to management, and 9 semester units in accounting (excluding accounting courses in tax, real estate, human resources, report writing, and marketing). These courses can be taken at either undergraduate or graduate levels. Successful completion of the State Fund Accounting Course administered by the Department of Finance, shall receive credit for three semester hours toward the required accounting courses.

SPECIAL PERSONAL REQUIREMENTS

Willingness to travel to worksites away from headquarters which could require extended hours of work and/or overnight or multiple-day trips on a continuous basis; and respond to changes in the work unit or on the work crew in a positive, professional manner.

THE POSITION

The Financial and Performance Evaluator I is the entry and first working level in the series. Under supervision, incumbents assist in the planning, data gathering, analytical and consultative duties associated with evaluating the completeness, and accuracy of financial and programmatic data and/or other work products and developing recommendations for management consideration. Incumbents may independently perform smaller or less complex assignments and/or assist in the completion of a segment of a larger or more complex assignment.

EXAMINATION INFORMATION

This examination will consist of a written exam weighted 100%. In order to obtain a position on the eligibility list, an overall minimum score of 70% must be attained. **The examination will be conducted online and is tentatively scheduled for the week of July 29, 2024.**

EXAMINATION SCOPE:

Candidates will be tested on:

Knowledge of:

1. Accounting principles.
2. Research, analytical, and evaluative techniques to obtain relevant information.
3. Problem-solving techniques.
4. Verbal communication fundamentals to gather and convey required information.
5. Effective writing skills to convey relevant information.
6. Word-processing and spreadsheet tools to prepare work products.

Ability to:

1. Learn general and governmental accounting and auditing principles and procedures.
2. Analyze, comprehend, and interpret policies, procedures, laws, regulations, and guidelines.
3. Manage time and multiple priorities effectively.
4. Work both in a team environment and individually.
5. Adapt/transition to changing assignments and/or situations as required.
6. Maintain confidentiality of information.
7. Verbally summarize a variety of facts, data, and recommendations to all levels of staff, management, and clients.
8. Prepare written products that are grammatically correct and convey relevant information.
9. Maintain professionalism and tact when interacting with colleagues, supervisors, and clients.
10. Comply with office policies and procedures and departmental core values.
11. Effectively utilize word-processing and spreadsheet tools to prepare work products.

VETERANS' PREFERENCE

Veterans' Preference will be granted for this examination. In accordance with Government Codes 18973.1 and 18973.5, whenever any veteran, or widow or widower of a veteran achieves a passing score on an open examination, he or she shall be ranked in the top rank of the resulting eligible list. Veterans' status is verified by the California Department of Human Resources (CalHR). Information on this program and the Veterans' Preference Application (Std. 1093) is available [online](#). Additional information on veteran benefits is available at the Department of Veterans Affairs.

GENERAL INFORMATION

The Department of Finance reserves the right to revise the examination plan to better meet the needs of the service if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service law and rules and all competitors will be notified.

Equal Employment Opportunity: The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.

State Drug Policy: It is the objective of the State of California to achieve a drug-free state workplace. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service, and the special trust placed in public servants.

Competitor's Responsibility: It is the competitor's responsibility to contact the Department of Finance, Human Resources Office, Examination Services, at (916) 323-4071, Telecommunications Device for the Deaf (TDD) (916) 324-6547, three days prior to the written test date if a notice has not been received. For an examination without a written feature, it is the competitor's responsibility to contact the Human Resources Office at (916) 323-4071, or TDD 324-6547 three weeks after the final filing date if they have not received a progress notice.

General Qualifications: Competitors must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and the ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the classification. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

Applicants who meet the requirements stated on this bulletin may take this examination, which is competitive. Possession of the entrance requirements does not ensure a place on the eligible list. Your performance in the examination described on the other side of this bulletin will be compared with the performance of the others who take this test (based upon job-related criteria), and all candidates who pass will be ranked according to their scores.

Privacy Policy: Pursuant to Government Code Section 11019.9 and Management Memo 00-14, the Department of Finance maintains a permanent privacy policy pursuant to adherence with the Information Practices Act of 1997. The Department's Privacy Policy is posted on the [Department's Website](#)

The California Relay Service enables a person with a Telecommunications Device for the Deaf (TDD) to communicate over telephone lines with another person who does not have a TDD. To use the California Relay Service, call the following: if you have a TDD, 1-800-735-2929, if you do not have a TDD, call 1-800-735-2922.

(Rev. 12-19)
