



CIVIL SERVICE BOARD (DRAFT) MEETING AGENDA

Date: January 15, 2015

OPEN SESSION 5:30 p.m.

CLOSED SESSION 6:00 p.m. (or as soon as reasonably practicable thereafter)

City Hall, One Frank H. Ogawa Plaza, Hearing Room 1

BOARD MEMBERS: Chair, Alex Drexel; Vice Chair, Andrea Gourdine; Winnie Anderson; Lauren Baranco; Judith Bodenhausen; David Jones; Jeffrey Levin

STAFF TO THE BOARD: Anil Comelo, HRM Director/Secretary to the Board
Tracy Chriss, Deputy City Attorney
Kip Walsh, Recruitment & Classification Manager/Staff to the Board
Cecilia Carey, Human Resources Technician/Staff to the Board

OPEN SESSION AGENDA

ROLL CALL

1) **OPEN FORUM 3 Minutes**

2) **CONSENT CALENDAR:**

ACTION

- a) Ratification of Provisional Appointment
 - Management Assistant (OPD-2014-PA01)
 - Program Analyst III – Foreclosure (PBD-2015-PA01)
- b) Approval of Employee Request for Leaves of Absence
 - PRD-2015-LA01
 - FMA-2015-LA01
 - OFD-2015-LA01

3) **OLD BUSINESS:**

- a) Approval of December 18, 2014 Civil Service Board Meeting Minutes **ACTION**
- b) Determination of Schedule of Outstanding Board Items **ACTION**
 - *No new items*
- c) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21 **INFORMATION**
- d) Update Regarding the Status of Port's Compliance with Ordinance No. 13120 C.M.S. (Amended Ordinance No. 8979) **INFORMATION**

4) NEW BUSINESS:

- | | |
|--|-------------|
| a) Approval of New Classification Specifications | ACTION |
| – Engineer, Civil Principal | |
| – Case Manager, Supervising | |
| – Treasurer | |
| b) Quarterly Classification Report | INFORMATION |
| c) Appeal of Classification Study Findings (Accountant II to Accountant III) | ACTION |
| – Accountant II, Elvira Galang (OPW-2014-AP02) | |

CLOSED SESSION AGENDA**ROLL CALL**

The Civil Service Board will now Convene in Closed Session and will Report Out any Final Decisions in Open Session Before Adjourning the Meeting pursuant to California Government Code Section 54957.6:

1) Personnel Matter for Public Employees (PWA-2013-AP003)

Pursuant to California Government Code Section 54957 – Public Employee Discipline/Dismissal/ Release
An appellant must notify the Civil Service Board in writing if she/he wishes to have a personnel matter heard in open session.

OPEN SESSION AGENDA**1) REPORT OF ACTIONS TAKEN IN CLOSED SESSION****ADJOURNMENT**

The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on February 19, 2015. All materials related to agenda items must be submitted by Thursday February 5, 2015. For any materials over 100 pages, please also submit an electronic version.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board
Attn: Cecilia Carey, Staff to the Civil Service Board
150 Frank H. Ogawa Plaza, 2nd floor
Oakland, CA 94612
civilservice@oaklandnet.com



This meeting is wheelchair accessible. To request materials in alternative formats, or to request an ASL interpreter or assistive listening device, please call the Civil Service Board staff at (510) 238-6467 or TDD (510) 238-3254 at least three working days before the meeting. Please refrain from wearing scented products to this meeting as a courtesy to attendees with chemical sensitivities.

CITY OF OAKLAND

Interoffice Memo



HUMAN RESOURCES MANAGEMENT DEPARTMENT
Anil Comelo, Director

DATE: January 15, 2015
TO: The Honorable Civil Service Board
ATTN: Anil Comelo, Director
Human Resources Management
THROUGH: Kip Walsh, Human Resources Manager
FROM: Lisette Del Pino, Senior Human Resource Analyst
SUBJECT: Request for Provisional Appointment in Classification of Management Assistant to be ratified at Civil Service Board Meeting of January 15, 2015 (OPD-2015-PA01)

Attached is a request from the Oakland Police Department to make a provisional appointment to a Management Assistant vacancy. The basis for this request is detailed in the attached Provisional Appointment Form as supporting documentation.

A Management Assistant is primarily responsible for supervising a division or department administrative operations including budget development and monitoring, personnel, policy and procedure development, payroll, and grant administration and other administrative services; and to supervise a small administrative support staff; and performs related duties as assigned.. The minimum qualifications for Management Assistant are: Bachelor's degree from an accredited college or university in public or business administration, economics, accounting, or related field, master's degree is desirable, and four years of experience performing progressively responsible and complex administrative work including one year of lead or supervisory experience.

The selected candidate meets the minimum qualifications of a Management Assistant.

Recruitment and Classification is in the process of administering a Civil Service Examination to permanently fill this vacancy within 120 days. The job announcement opened on November 4, 2014. Once the eligible list is established, the police department will conduct hiring interviews and a comprehensive background.

I recommend the selected candidate for provisional appointment to this Management Assistant vacancy in the Oakland Police Department.

CITY OF OAKLAND



HUMAN RESOURCES MANAGEMENT DEPARTMENT
Anil Comelo, Director

DATE: January 15, 2015
TO: Oakland Police Department
ATTN: Penny Ha
FROM: Human Resources Management
SUBJECT: Management Assistant Provisional Appointment

Attached is your copy of the packet of materials requesting provisional appointment of Bruce Stoffmacher to a vacant Management Assistant position.

Your request has been approved by the Personnel Director and will be forwarded to the Civil Service Board for ratification at the January 15, 2015 scheduled meeting.

Bruce Stoffmacher may be provisionally appointed to the classification noted above effective **Monday, January 19, 2015**. Please be advised that if the Civil Service Board fails to ratify this provisional appointment, it will be rescinded immediately following the meeting of the decision. We anticipate that the next regularly scheduled meeting of the Civil Service Board will be January 15, 2015 at 5:30 pm. Civil Service Board meetings are held in City Hall. Please attend or send a representative that can answer questions related to this appointment.

Please advise Bruce Stoffmacher that to be considered for permanent appointment, he must place high enough on the eligibility list to be scheduled for a departmental interview.

Please note that in keeping with Civil Service Rule 5.06 (a) Provisional Appointments, provisional appointees will be removed from their provisional assignments at 120 days, whether or not a list has been established. The end date for this appointment is **May 19, 2015**. You will receive a notice from this office when 30 days are remaining.

Please call me at (510) 238-3179 if you have any questions or need any additional information concerning this provisional appointment.

Lisette Del Pino
Sr. Human Resource Analyst

**OAKLAND CIVIL SERVICE BOARD
PROVISIONAL APPOINTMENT REQUEST**

SCHEDULED MEETING DATE FOR CONSIDERATION: January 15, 2015

AREA REQUESTED

POSITION: Management Assistant

DEPARTMENT: Oakland Police Department

APPOINTMENT DURATION: 120 days maximum

STATUS OF RECRUITMENT AND EXAMINATION PROCESS

DATE ELIGIBLE LIST EXPIRED OR WAS EXHAUSTED: _____

DATE PERSONNEL REQUISITION RECEIVED: 6/04/14

CURRENT STATUS OF EXAMINATION: In Progress

JUSTIFICATION:

Reason Needed:

This provisional appointment is needed to fill one current vacancy. The requisition requesting a provisional appointment was approved on 1/6/15. A provisional appointment will allow the work to be performed while an eligibility list is being developed.

Other Alternatives Explored and Eliminated:

Reinstatement process followed however employee declined reinstatement opportunity.

IMPACT IF REQUESTS ARE NOT APPROVED (i.e., services, fiscal, other):

Department will be without support until the recruitment and background process is finished if a provisional appointment is not granted.

Attachments:

N/A

Recruitment and Classification Staff Recommendation, including following pertinent information:

- Summary of Application Qualifications ✓
- Current Residency Status: Oakland Resident
- Current Employment Status A current City of Oakland employee



CITY OF OAKLAND

MEMORANDUM

DATE: December 30, 2014

TO: Miloanne Hecathorn, Management Assistant
Housing & Community Development

FROM: Angelina DeMaria
Asst Human Resource Analyst

SUBJECT: Program Analyst III SC - Foreclosure Provisional Appointment

Attached is your copy of the packet of materials requesting provisional appointment of Jean Casey to a vacant Program Analyst III – Selectively Certified in Foreclosure position.

Your request has been approved by the Personnel Director and will be forwarded to the Civil Service Board for ratification at their next regularly scheduled meeting.

Jean Casey may be provisionally appointed to the classification noted above effective Monday, January 5, 2015. Please be advised that if the Civil Service Board fails to ratify this provisional appointment, it will be rescinded immediately following the meeting of the decision. We anticipate that the next regularly scheduled meeting of the Civil Service Board will be January 15, 2015 at 5:30 pm. Civil Service Board meetings are held in Hearing Room 2 in City Hall. Please attend or send a representative that can answer questions related to this appointment.

Please advise Jean Casey that to be considered for permanent appointment, she must submit the appropriate application materials, and place high enough on the eligibility list to be scheduled for a departmental interview. As you are aware, a recruitment to permanently fill this position is currently in progress.

Please note that in keeping with Civil Service Rule 5.06 (a) Provisional Appointments, provisional appointees will be removed from their provisional assignments at 120 days, whether or not a list has been established. The end date for this appointment is 120 calendar days from appointment date (May 20, 2015). You will receive a notice from this office when 30 days are remaining, which is April 20, 2015.

If you have any questions or need any additional information concerning this provisional appointment, please call Angelina DeMaria, Assistant Human Resource Analyst at (510) 238-3413.

cc: File –CSB January 15, 2015



CITY OF OAKLAND

MEMORANDUM

DATE: January 15, 2015

TO: The Honorable Civil Service Board

FROM: Angelina De Maria
Assistant Human Resource Analyst

THROUGH: Anil Comelo, DHRM Director
Secretary to the Board

THROUGH: Kip Walsh, Recruitment & Classification Manager

SUBJECT: Request for Provisional Appointment in Classification of Program Analyst III (Selective Certification in Foreclosure) to be ratified at Civil Service Board Meeting of January 15, 2015 (PBD-2015-PA01)

Attached is a request from the Planning and Building Department to make a provisional appointment to a Program Analyst III (Selective Certification in Foreclosure) vacancy. The basis for this request is detailed in the attached Provisional Appointment Form as supporting documentation.

Under direction, a Program Analyst III directs or performs program planning, research, analysis and development; negotiates and administers contracts; writes grant proposals and submits applications; implements and monitors programs; prepares reports and drafts proposed programs; performs needs assessment; provides assistance to community organizations, district boards and citizen advisory bodies; supervises assigned staff; and performs related duties as assigned. The current vacancy is selectively certified in Foreclosure.

The minimum qualifications for Program Analyst III are:

Education: Bachelor's degree in business or public administration, social work, behavioral sciences or a related field from an accredited college or university. A Master's degree is desirable.

Experience: Four (4) years or relevant experience in the particular area of program administration, including one year of lead direction or supervisory experience.

The selected candidate's combined education and experience meets the minimum qualifications of a Program Analyst III. He/she is in possession of a Master's degree in Urban Planning and his/her experience includes residential lending, project management, familiarity with real estate and academic research of foreclosure trends in Oakland.

Recruitment and Classification will be in the process of administering a Civil Service Examination to permanently fill this vacancy within 120 days. The job announcement will open on January 20, 2015 and close on February 6, 2015.

The Department of Human Resources Management recommends that the Civil Service Board ratify the provisional appointment to this Program Analyst III vacancy in the Planning and Building Department beginning on January 20, 2015 and ending on or before May 20, 2015.

**OAKLAND CIVIL SERVICE BOARD
PROVISIONAL APPOINTMENT REQUEST**

SCHEDULED MEETING DATE FOR CONSIDERATION: January 15, 2015

AREA REQUESTED

POSITION: Program Analyst III – Selective Certification in Foreclosure

DEPARTMENT: Planning & Building Department

APPOINTMENT DURATION: 120 days maximum

STATUS OF RECRUITMENT AND EXAMINATION PROCESS

DATE ELIGIBLE LIST EXPIRED OR WAS EXHAUSTED:

DATE PERSONNEL REQUISITION RECEIVED: 12/16/2014

CURRENT STATUS OF EXAMINATION: The job announcement is scheduled to open on January 20, 2015 and close on February 6, 2015. When all applicants have been assessed, exam development will begin. Upon completion, HRM will move forward with the examination and selection process.

JUSTIFICATION:

Reason Needed: The Program Analyst III (Selective Certification in Foreclosure) position is needed to head programs addressing the increase of properties located in Oakland going through the foreclosure process.

This provisional appointment is needed to fill the one (1) current selective certification vacancy. The requisition requesting a provisional appointment was approved and the appointee's first day of work will be January 20, 2015. A provisional appointment will allow the work to be performed while an eligibility list is being developed.

Other Alternatives Explored and Eliminated:

N/A.

IMPACT IF REQUESTS ARE NOT APPROVED (i.e., services, fiscal, other):

Without this position and specialized skills, the demonstrable skills achieved in blight abatement and code enforcement for defaulted, foreclosed, and investor owned properties would decline significantly.

Attachments:

Employment Application: Yes

Personnel Requisition: Yes

Resume: Yes

Recruitment and Classification Staff Recommendation, including following pertinent information:

- Summary of Application Qualifications: ✓
- Current Residency Status: Oakland Resident
- Current Employment Status: Current City of Oakland employee



MEMORANDUM

DATE: January 15, 2015

TO: The Honorable Civil Service Board

FROM: Kip Walsh, HR Manager, Recruitment & Classification / Staff to the Board

THROUGH: Anil Comelo, Director DHRM / Secretary to the Board

SUBJECT: Request Authorization for Employee Request for Leave of Absence

DHRM is in receipt of three (3) complete Unpaid Leave of Absence request (s) pursuant to Personnel Manual Section 8.07 Miscellaneous Leaves of Absence.

- iii. To permit the employee to take care of urgent or most important personal business which cannot feasibly be accomplished by someone else.
- iv. To permit the employee to take an exempt position in the City services.

12/24/2014	Tiffany Millinder- Heard	Administrative Assistant I	Parks & Recreation	PRD-2015-LA01	CSR 8.07
12/15/2014	Somjintana	Mossman	FMA	FMA-2015-LA01	CSR 8.07
01/06/2015	Darin White		OFD	OFD-2015-LA02	CSR 8.07

RECOMMENDATION: Staff recommends that the Civil Service Board approve the requested Leave of Absences.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- SLV - Sick Leave (no pay)
- FDN - Family Death (no pay)
- ANP - Miscellaneous (no pay)
- MNP - Military Leave (no pay)
- Maternity Leave (no pay)

Employee's Name Tiffany Millinder Heard Employee's ID  Today's Date 12/24/14

Department/Division Parks & Recreation Employee Job Title AA I

Request: 11 Days Hours From 1/5/15 To 1/19/15
No. of Days or Hours Select Days or Hours

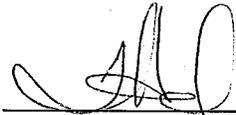
Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
P	1 year	No	No	No*	Maternity Leave

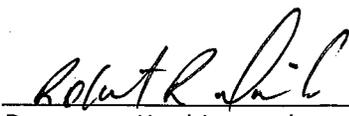
* Additional Information

Employees on ANP, MNP, SLV or Maternity leave may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.


 Employee's Signature _____ Date 12/24/14

 Civil Service Board Approval Date


 Department Head Approval _____ Date 12/24/14

 City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Maternity Leave (no pay)

Employee's Name Somjintana Massman

Employee's ID 

Today's Date 12/15/14
5/8/14

Department/Division Treasury

Employee Job Title Cashier

I Request: Days Hours From 12/23/14 To 2/2/14
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave PDL - CFRA
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
P	1 year	No	No	No*	Maternity Leave

* Additional Information

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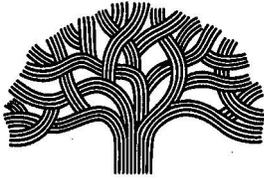
[Signature]
Employee's Signature 12/15/2014
Date

Civil Service Board Approval Date

[Signature]
Department Head Approval 12/16/14
Date

City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



CITY OF OAKLAND

INTER OFFICE MEMORANDUM

TO: Teresa Deloach Reed
Fire Chief

FROM: Darin White *DW*
Battalion Chief

SUBJECT: Leave of Absence Request to Accept Exempt Position **DATE:** January 8, 2015

Approval	<i>Teresa Deloach Reed</i>	Date	<i>1-8-15</i>
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This memo is to request a leave of absence from the position of Battalion Chief (represented by bargaining unit local 55) in order to accept the appointment to the exempt position of Deputy Chief of Fire effective January 17, 2015.

This request is in accord with the Personnel Manual of the Civil Service Board, Section 8.07 – Miscellaneous Leaves of Absence (c), v which states in part: “Reasons for Which Leaves of Absence without Pay May Be Granted..... To permit the employee to take an exempt position in the City Services”. Please see attached document.

Respectfully submitted,

Darin White

Darin M. White
Battalion Chief
Special Operations/Safety Officer
Oakland Fire Department

cc: Trinette Gist-Skinner, Division Manager
File



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Maternity Leave (no pay)

Employee's Name Darin White Employee's ID  Today's Date 1/8/15

Department/Division Oakland Fire Department Employee Job Title Battalion Chief

Request: 1 No. of Days or Hours Days Hours From Jan. 16, 2015 To Assignment End (HRM-Cecilia Carey)

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaied leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
P	1 year	No	No	No*	Maternity Leave

* Additional Information

Employees on ANP, MNP, SLV or Maternity leave may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.

Darin White 1/8/15
Employee's Signature Date

Mesa Delacruz Reed 1-8-15
Department Head Approval Date

Civil Service Board Approval Date

City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.

attend funeral or memorial services for someone other than those included within the definition of the immediate family under Section, 8.02 (e) (2) of the Sick Leave Rule. It is the intent of this provision to cover the kind of situation in which someone other than immediate kin has raised the employee, or due to unusual circumstances has a very close relationship with the employee.

- (d) Procedure for Requesting Leave. In order to qualify for Family Death Leave, the employee shall obtain the approval of her/his immediate supervisor or a higher supervisor prior to going on leave of absence. If the circumstances are such- as to clearly make this impracticable, he/she shall notify her/his supervisor at the earliest possible time. Failure to do so may be cause for denying leave with pay.

Section 8.07 - Miscellaneous Leaves of Absence. Miscellaneous leaves of absence other than vacation and sick leave may be granted by the appointing authority, subject to the approval of the Board, unless otherwise provided. Department heads may grant leaves of absence without pay for periods not in excess of three working days; provided, however, that no employee shall be granted a total of more than five working days of such leave without pay in any one calendar year.

- (a) Procedure for Granting Leaves of Absence. An employee may be granted a leave of absence only if...
- i. The employee makes a written request to her/his department head at least five working days prior to the effective date of the request, stating her/his specific reasons for the request.
 - ii. The appointing authority recommends the request and forwards it to the Board prior to the effective date of the requested leave. Leaves of absence without pay of three working days or less need only be reported to the office of the Board in writing. The other steps are necessary for this type of leave.
- (b) Limitation Upon Leaves of Absence Without Pay. No leave of absence without pay, other than leaves to accept exempt positions in the City service or classified positions in the City service financed in whole or in part by Federal or tax exempt foundations, may be granted for a period in excess of one year. Leaves of absence to fill exempt positions in the City service or classified positions in the City service financed in whole or in part by Federal or tax exempt foundations shall be granted for the entire period during which the employee serves in such positions. (C.S. Res. 39635 - 11/30/65) A leave of absence without pay of thirty (30) consecutive days or less shall not impact seniority. [Amended 5/12/2011 CSB]
- A leave of absence may be extended, upon the recommendation of the appointing authority and the approval of the Board.
- (c) Reasons for Which Leaves of Absence without Pay May Be Granted. Leaves of absence without pay may be granted for reasons which, in the opinion of the appointing authority and the Board, appear to be proper and in the best interest of the City, such as ...

- i. To permit the employee to receive additional education of such nature that will improve the employee's job performance and increase her/his worth to the City.
- ii. To permit the employee, because of her/his particular abilities or her/his outstanding competence, to assist another governmental jurisdiction, and which in a direct way will enhance the prestige of the City of Oakland.
- iii. To permit the employee to take care of urgent or most important personal business which cannot feasibly be accomplished by someone else.
- iv. To permit employee to settle domestic problems.
- v. To permit the employee to take an exempt position in the City services.
- vi. To permit the employee to retain promotional and seniority rights to her/his permanent position upon accepting appointment to a classified position in the City service under a program financed in whole or in part by Federal or tax exempt foundations. (C.S. Res. 39653 – 11/30/65)

(d) Leaves of Absences With Pay. In addition to those leaves absence with pay which are provided for elsewhere in these rules, a leave of absence with pay may be granted to an employee under special circumstances which, in the opinion of the best interests of the City to do so. In no case shall leave with pay be granted in excess of three working days in any calendar year. Requests for such leave must be considered at a regular meeting prior to the effective date of the leave.

Leave of absences with pay may be granted to an employee who has been selected for jury: duty and from which he/she cannot be excused. Leave with pay for unexcused jury duty is not subject to the time limitation expressed above. Leave of absence with pay for jury duty may be approved by the appointing authority without reference to the Board, and will not be counted as regular leave with pay. An employee who serves on jury duty shall be paid her/his regular salary for the period of such duty but shall be required, under the provisions of the Charter, to turn over to the City Treasurer all fees, which he/she receives as payment for such jury duty.

To be eligible for a leave of absence with pay for other than jury duty, the employee must have served the City continuously for a period of not less than six months and her/his services must have been thoroughly satisfactory.

Section 8.08 - Return to Duty Following Leave. Every leave of absence shall be upon the condition that the employee taking the leave shall, subject to these rules, have the definite and absolute right, upon her/his return to her/his employment on the termination of her/his leave, to be reinstated to a position in the same class as that occupied by her/him at the time of the commencement of such leave, and he/she shall be entitled to such other privileges as are provided for in these rules. Any employee who fails to return to perform her/his regular duties by the date indicated in her/his leave, provided such leave has not been extended by action to the Board, may be terminated.



CIVIL SERVICE BOARD (DRAFT) MEETING MINUTES

Date: December 18, 2014

CLOSED SESSION – 5:30 p.m.

OPEN SESSION – 6:30 p.m. (or as soon as reasonably practicable thereafter)

City Hall, One Frank H. Ogawa Plaza, Hearing Room 1

BOARD MEMBERS PRESENT: 5 -

**Chairperson Alex Drexel
Vice Chairperson Andrea Gourdine
Board Member Lauren Baranco
Board Member Judith Bodenhausen
Board Member David Jones**

BOARD MEMBERS ABSENT: 2 -

**Board Member Winnie Anderson
Board Member Jeffrey Levin**

STAFF PRESENT:

**Anil Comelo HRMD Director / Secretary to the Board
Tracy Chriss, Deputy City Attorney
Kip Walsh, HR Manager / Staff to the Board
Cecilia Carey, HR Technician / Staff to the Board**

OPEN SESSION AGENDA

ROLL CALL

The Civil Service Board convened in Open Session Prior to Adjourning to Closed Session and Reported Out any Final Decisions in Open Session Before Adjourning the Meeting pursuant to California Government Code Section 54957.6:

CLOSED SESSION AGENDA

– **Personnel Matter for Public Employees (PWA-2013-AP003)**

- This item had been continued from the November 6, 2014 “Special” Civil Service Board meeting at the Appellant’s request. Appellant appeared before the Board but was without Union representation. The Board has rescheduled this item as a final Closed Session item for the January 15, 2015 Civil Service Board meeting and has advised staff to notify the Appellant’s legal and SEIU Local 1021 representatives by certified mail, regular mail and email of the rescheduled date and time. The Board has also advised the Appellant to contact his Union representative as well as SEIU Local 1021’s legal representative and that this is the last time this item will be re-scheduled.

– **Personnel Matter for Public Employees (OPD-2014-AP03)**

- Item (OPD-2014-AP03) was withdrawn by Appellant prior to the meeting.

OPEN SESSION AGENDA**ROLL CALL****1) REPORT OF ACTIONS TAKEN IN CLOSED SESSION**

- As reported by Tracy Chriss, Deputy City Attorney; Personnel Matter for Public Employees (PWA-2013-AP003) was continued to the January 15, 2015 Civil Service Board meeting.

2) OPEN FORUM 3 Minutes – No Speakers**3) CONSENT CALENDAR:****ACTION**

- a) Ratification of Provisional Appointment
 - Office Assistant II – HCD-2014-PA01
 - Equal Opportunity Specialist CAO-2014-PA01
 - Fire Investigator OFD-2014-PA01
- b) Approval of Employee Request for Leaves of Absence
 - PWA-2014-LA01
 - OFD-2014-LA01
 - LIB-2014-LA07
 - LIB-2014-LA08
 - LIB-2014-LA09
- c) Approval of Revised Classification Specification
 - Real Estate Agent

44750 A motion was made by Vice Chair Gourdine and seconded by Board Member Jones to approve the items on the Consent Calendar. The motion carried by the following vote:

Votes: Board Member Ayes: 5 - Drexel, Gourdine, Baranco, Bodenhausen, Jones
 Board Member Noes: None
 Board Member Abstentions: None
 Board Members Absent: 2 – Anderson, Levin

The motion passes

4) OLD BUSINESS:

- a) Approval of November 6, 2014 “Special” Civil Service Board Meeting Minutes

44751 A motion was made by Board Member Bodenhausen and seconded by Chair Drexel to approve the items on the Consent Calendar. The motion carried by the following vote:

Votes: Board Member Ayes: 5 - Drexel, Gourdine, Baranco, Bodenhausen, Jones
 Board Member Noes: None
 Board Member Abstentions: None
 Board Members Absent: 2 – Anderson, Levin

The motion passes

- b) Determination of Schedule of Outstanding Board Items
- *No new items*
- c) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

The report is received and filed.

- d) Update Regarding the Status of Port’s Compliance with Ordinance No. 13120 C.M.S. (Amended Ordinance No. 8979)

Kip Walsh, HR Manager, Recruitment & Classification reported on behalf of Chris Boucher that the Port is currently engaged in Meet & Confer with the Unions and that there are no new items to report to the Board at this time.

- e) Public Employees Appeal of Probationary Release (OPD-2014-AP01)
- Recommendation by Staff that the Civil Service Board issue a Written Order to compel both parties to set a hearing date for the appeal of probationary release (OPD-2014-AP01).

44752 A motion was made by Vice Chair Gourdine and seconded by Chair Drexel to schedule a hearing before an Outside Hearing Officer in the matter of Public Employees Appeal of Probationary Release (OPD-2014-AP01) on February 26, 2015 or February 27, 2015 and directing staff under the guidance of the City Attorney to notify the Appellant’s legal representatives and Hearing Officer by certified mail, regular mail and email. The motion carried by the following vote:

Votes: Board Member Ayes: 5 - Drexel, Gourdine, Baranco, Bodenhausen, Jones
 Board Member Noes: None
 Board Member Abstentions: None
 Board Members Absent: 2 – Anderson, Levin

The motion passes

f) Public Employees Appeal of Probationary Release (OPR-2014-AP01)

- Recommendation by Staff to have matter heard by an Outside Hearing Officer.

44753 A motion was made by Board Member Jones and seconded by Vice Chair Gourdine to refer the matter of (OPR-2014-AP01) to an Outside Hearing Officer. The motion carried by the following vote:

Votes: Board Member Ayes: 5 - Drexel, Gourdine, Baranco, Bodenhausen, Jones
Board Member Noes: None
Board Member Abstentions: None
Board Members Absent: 2 – Anderson, Levin

ADJOURNMENT: 6:57 PM

The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on January 15, 2015. All materials related to agenda items must be submitted by Thursday January 1, 2015. For any materials over 100 pages, please also submit an electronic version.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board
Attn: Cecilia Carey, Staff to the Civil Service Board
150 Frank H. Ogawa Plaza, 2nd floor
Oakland, CA 94612
civilservice@oaklandnet.com



This meeting is wheelchair accessible. To request materials in alternative formats, or to request an ASL interpreter or assistive listening device, please call the Civil Service Board staff at (510) 238-6467 or TDD (510) 238-3254 at least three working days before the meeting. Please refrain from wearing scented products to this meeting as a courtesy to attendees with chemical sensitivities.

CIVIL SERVICE BOARD
APPEALS & HEARINGS CALENDAR
PENDING LIST – January 15, 2015

1. TO BE SCHEDULED

Case Number	Classification	Dept.	Action Pending	Hearing Date	Notes/Next Steps
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2. SCHEDULED AND PENDING

Case Number	Classification	Dept.	Action Pending	Hearing Date	Notes/Next Steps
PWA-2013-AP003	Heavy Equipment Operator	Public Works	6.05 Appeal of Probationary Removal/Demotion	January 15, 2015	Review of Hearing Officer Findings
PWA-2014-AP02	Accountant II	Public Works	3.04 (e) Appeal of Classification Study Results	January 15, 2015	Hearing scheduled
HCD-2014-AP02	Account Clerk II	Housing & Community Development	3.04 (e) Appeal of Classification Study Results	February 19, 2015	Rescheduled from Oct. 16, 2014 – Appellant withdrew appeal on January 8, 2015.

3. REFERRED TO OUTSIDE HEARING OFFICER

Case Number	Classification	Dept.	Action Pending	Referral Date	Notes
OPD-2014-AP01	Police Officer	Police Department	6.05 Appeal of Probationary Removal/Demotion	March 20, 2014	Referred to Outside Hearing Officer. Hearing Officer selected 9/8/2014
CAU-2014-AP01	Performance Auditor	City Auditor	10.03 - Appeal of Disciplinary Action	March 20, 2014	Referred to Outside Hearing Officer – Hearing Officer Selected 9/18/14
OPR-2014-AP01	Gardener Crew Leader	Parks & Recreation	6.05 Appeal of Probationary Removal/Demotion	December 18, 2014	Request to refer to Outside Hearing Officer – Referred to Outside Hearing Officer

4. UNDER REVIEW

Case Number	Classification	Dept.	Action Pending	Action Date	Notes
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CITY OF OAKLAND

STAFF REPORT

DATE: January 15, 2015

TO: THE HONORABLE CIVIL SERVICE BOARD

FROM: Kip Walsh, HR Manager, Recruitment & Classification

THROUGH: Anil Comelo, Secretary to the Board

SUBJECT: TEMPORARY EMPLOYEES – Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of All ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City And Local 21

SUMMARY

Staff has prepared this report to provide the Civil Service Board with an update on compliance with the Civil Service Rules related to temporary employees since the last report of December 18, 2015. This report focuses on temporary employees in the categories of Exempt Limited Duration Employees (ELDEs) and Temporary Contract Service Employees (TCSEs), who are currently employed in the City of Oakland but are not in compliance with the Civil Service Rules and other City policies.

As of the pay period that ended December 30, 2014 there are a total of eighty-four (84) employees in the TCSE (27), TCSE/Annuitant (47), and ELDE (10) categories, of which twelve (12) require technical solutions not yet available and one (1) is out of compliance with the Civil Service Rules. Six (6) assignments were added and two (2) removed during this reporting period.

Reports showing all of the temporary assignments discussed in this report are included in a list (*Attachment A*) and a chart of trends (*Attachment B*) attached to this narrative report to provide a snapshot of the overall changes month to month.

BACKGROUND

The use of temporary employees is allowed under Civil Service Rule 5 (Certification and Appointment) in recognition that standard Civil Service employment practices can be cumbersome when a time-sensitive assignment arises or existing resources do not fit a specific need. Pursuant to the Civil Service Rules, Section 5.06 governing temporary assignments, ELDE assignments may not exceed one year and TCSE assignments may not be “ongoing or repetitive.” The limitation for TCSEs is interpreted to mean that assignments in that category may not extend across more than one fiscal year and for longer than twelve months.

HONORABLE CIVIL SERVICE BOARD

Subject: Temporary Employees

Date: January 15, 2015

Page 2

STATUS OF CURRENT ASSIGNMENTS

The following chart shows a summary of the status of all TCSE, TCSE/Annuitant, and ELDE assignments currently in the City.

NON-COMPLIANT				
DEPARTMENT	ELDE	TCSE	TCSE/Annuitant	TOTAL
OPW	1			1
TOTALS	1	0	0	1

PART TIME CLASSIFICATION REQUIRED				
DEPARTMENT	ELDE	TCSE	TCSE/Annuitant	TOTAL
City Administrator		1	1	2
Fire		2	2	4
Housing & Community		1		1
Library			1	1
Police		1	1	2
Public Works		1		1
TOTALS	0	6	5	11

POLICY COMPLIANT				
DEPARTMENT	ELDE	TCSE	TCSE/Annuitant	TOTAL
City Administrator	2	1	1	4
City Auditor		1	1	2
Council			1	1
Finance	1		2	3
Housing & Community	2	1		3
Human Resources	1	4	1	6
Human Services	1	3	2	6
Library			1	1
Mayor		1	2	3
Planning & Building	1	5		6
Police	1	7	28	36
Public Works		1		1
TOTALS	9	24	39	73

Grand Total	9	31	45	84
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NON-COMPLIANT ASSIGNMENTS

The one assignment showing as non-compliant above represent:

1. Economic & Workforce Development – the Mayor’s Office reports that the employee is no longer working, but that the termination paperwork has not been processed. HRM is working with the department to reconcile the record.

TECHNICAL SOLUTION REQUIRED

The TCSE assignments in this group are for work that is part time and intermittent and should be categorized as exempt part time assignments, consistent with Charter Section 902(d) which exempts assignments of this type from civil service. The category of “TCSE” is used in lieu of an available exempt part time equivalent title in the Salary Schedule of the Salary Ordinance. Because exempt part time assignments have been under particular scrutiny in the past two years or so, it has been very challenging to bring forward Salary Ordinance amendments for City Council to approve to address this specific system barrier. HRM staff will continue to work with departments and the City’s internal systems to create a more effective means of managing and reporting on these assignments.

Progress to Date

The chart provided (*Attachment B*) with this report demonstrates the movement of temporary TCSE and ELDE assignments from the starting point in September 2010 followed by the monthly numbers for the past 12 months.

HRM will continue to meet and confer with the representative unions, work on development or refinement of related City policies, and continue to develop staffing solutions for departments. HRM is committed to resolving the remaining non-compliant temporary assignments in as timely a manner as possible.

RECOMMENDATION

Staff recommends that the Civil Service Board accept the monthly report on temporary assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs).

For questions regarding this report, please contact Kip Walsh Human Resources Manager, Recruitment & Classification at (510) 238-7334.

Attachments:

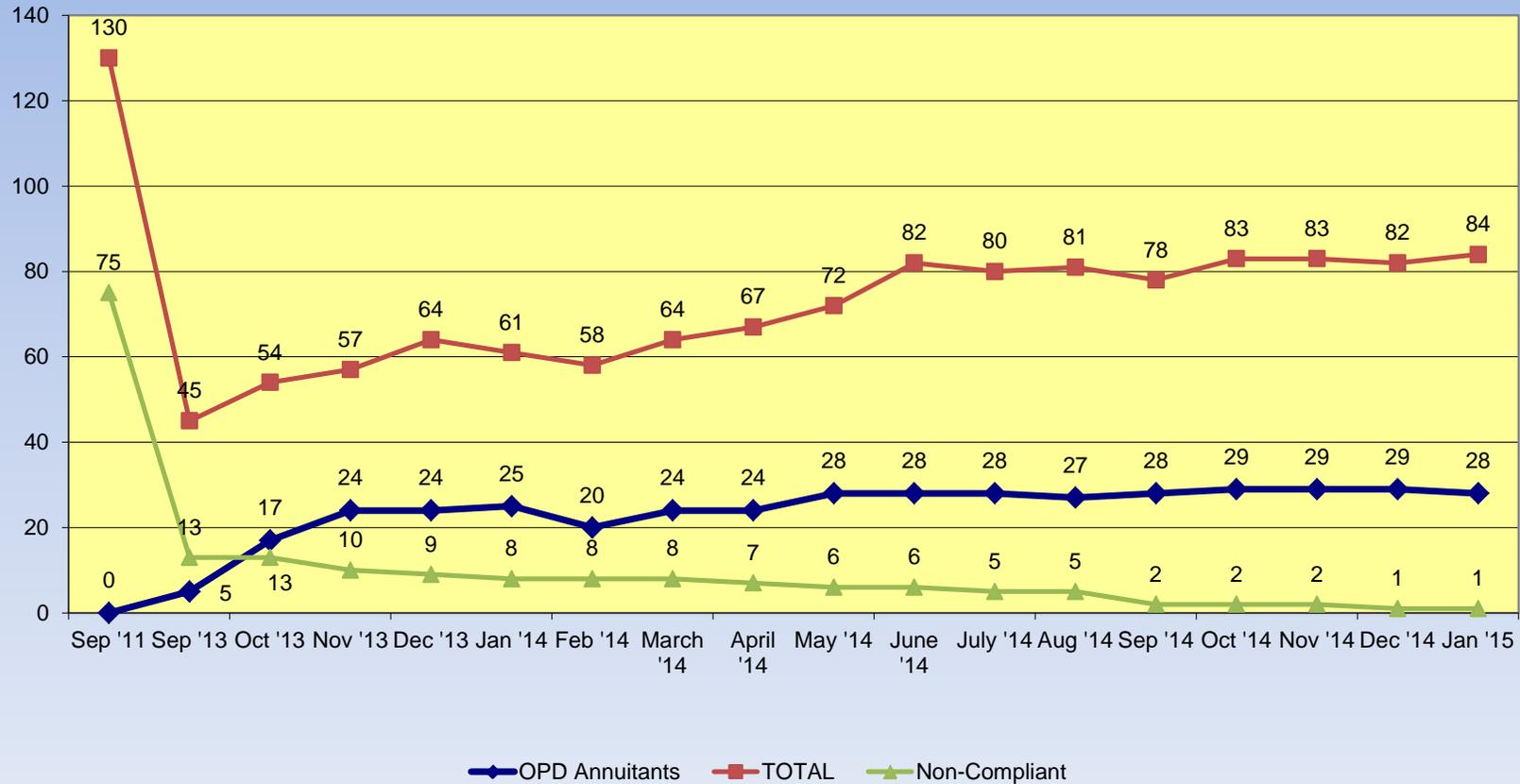
- A. TCSE/ELDE Report: For Pay Period ending December 30, 2014
- B. TCSE/ELDE Compliance Trend Chart: Pay Period ending December 30, 2014

	TCSE/ELDE	DEPT	FULL NAME	ORG	CLASS DATE		RESOLUTION	NOTES
CLOSED ASSIGNMENTS								
1	TCSE	FIRE	Leeper, James Ernest	20711 - Emergency Services Program Unit	4-Apr-11	Technical	SO-PT/L21	Addition of PT class to Salary Ordinance recommended. Following meetings with Local 21, Salary Ordinance amendment continues to be pending. (61 hours worked FY13/14)
2	TCSE/Annuitant	EWD	Goodall, Brendalynn	02971 - Workforce Development	28-May-13	No, repetitive	Assignment End	Department reports that employee has terminated, but shows in system as active. Working with department to reconcile.
3	ELDE	OPD	Ho, Kenneth	46521 - Public Safety Maintenance & Installation	9-Dec-13	YES	Recruitment	Pending class study and recruitment for Electronics Technician. Estimated end date 12/31/2014.
NON-COMPLIANT ASSIGNMENTS								
1	ELDE	OPW	Ford, Michael	30261 - Transportation Services Admin	1-Jan-14	No, repetitive	Assignment End	Managing RFP process for City garages with expired contracts. EE is permanent City employee effective Jan 5, 2015. Spreadsheet will reflect changes once payroll process PAR.
PENDING CREATION OF PART TIME "CLASSIFICATIONS"								
2	TCSE/Annuitant	OPD	Cronin, David	103130- Animal Shelter	3-Apr-13	Technical	Recruitment	Temporarily supporting Animal Shelter operations and transition.
3	TCSE	FIRE	Hutchens, Gail Lee	20711 - Emergency Services Program Unit	15-Mar-06	Technical	SO-PT/L21	Addition of PT class to Salary Ordinance recommended. Following meetings with Local 21, Salary Ordinance amendment continues to be pending. (24 hours worked FY13/14)
4	TCSE/Annuitant	FIRE	Kelly, Michael M.	20815 - U.S.A.R	24-Jan-05	Technical	SO-PT/L21	Annuitant. USAR Cache Manager. Has highly specialized and unique skills/training. Paid by FEMA Grant. CalPERS rules allow. (124 hours worked FY13/14)
5	TCSE	FIRE	Morelli, Jeffrey E	20711 - Emergency Services Program Unit	4-Apr-11	Technical	SO-PT/L21	Addition of PT class to Salary Ordinance recommended. Following meetings with Local 21, Salary Ordinance amendment continues to be pending. (716 hours worked FY13/14)
6	TCSE	HCD	Moroz, Linda M.	88969 - Residential Rent Arbitration	25-Feb-08	Technical	SO-PT/L21	Addition of PT class to Salary Ordinance recommended. Following meetings with Local 21, Salary Ordinance amendment continues to be pending. (287 hours worked FY13/14)
7	TCSE	OPD	Singer, Carl E.	103130 - Animal Shelter	3-Feb-01	Technical	SO-PT/L21	Addition of PT class to Salary Ordinance recommended. Following meetings with Local 21, Salary Ordinance amendment continues to be pending. (339 hours worked FY13/14)
8	TCSE/Annuitant	Library	Singh, Surinder P.	61511 - African-American Museum & Library	28-Nov-09	Technical	Assignment End	Specialized assignment at AAMLO. CalPERS rules allow limited use, but until Oracle upgrade will continue to show on report.
9	TCSE	CAO	Starling, Lane Foster	63221 - KTOP Operations	1-Jul-03	Technical	SO-PT/L21	Addition of PT class to Salary Ordinance recommended. Following meetings with Local 21, Salary Ordinance amendment continues to be pending. (599 hours worked FY13/14)
10	TCSE	PWA	Troyan, Vitaly	30111-Public Works	17-Aug-13	Technical	Assignment End	Temporary and intermittent support of special projects.
11	TCSE/Annuitant	CAO	Uber, William	02111 - City Manager Administration Unit	13-May-13	Technical	Assignment End	Temporary and intermittent support of special projects.
12	TCSE/Annuitant	FIRE	Williams, James Alvin	20711 - Emergency Services Program Unit	18-Aug-08	Technical	Assignment End	Unique assignment. Retired Alameda County Sheriff. Provides expertise on Homeland Security issues. Paid by Homeland Security Grant. (49 hours FY13/14)
TCSE/ELDE DEPT FULL NAME ORG CLASS DATE COMPLIANT? RESOLUTION NOTES								
13	ELDE	HRM	Aaron, Denise M.	05111 - Personnel Administration	12-May-14	YES	Recruitment	Temp assignment pending creation of new classification (Training Coordinator) and budgeted position. Examination planning underway.
14	TCSE	HCD	Bailey-Curry, Azaria	89919 - HCD Administration Unit	17-Mar-14	YES	Assignment End	Temp admin support for Sustainability Communities Planning Grant - estimated end date March 2015.
15	TCSE	OPD	Brown, Delores	103242 - Internal Affairs	21-Jul-14	YES	Assignment End	Temporary assignment. Estimated end date February 2015.
16	TCSE	PBD	Brown, Shaneice	84412 - Planning Administration Unit	23-Jun-14	YES	Assignment End	Pending classification analysis of permanent assignment. Estimated end date January 2015.
17	TCSE	OPD	Calhoon, Derek	103130 - Animal Shelter	16-Aug-14	YES	Recruitment	Pending Recruitment
18	TCSE	MAYOR	Duncan, Felicia	85311-Workforce Development	28-Apr-14	YES	Assignment End	Support to Mayor's Summer Job Program and reporting. Estimated end date is Nov 2014.
19	TCSE	HSD	Dupree, Kathryn	78235 - Food Services	16-Jun-14	YES	SO-PT	Addition of PT class to Salary Ordinance recommended. Under review for Council report.
20	TCSE	HSD	Edge-Wilson, Bereather	78361 - CSBG Admin	20-Aug-14	YES	Assignment End	Temporary support of Shelter operations. Estimated end date is February 2015.
21	TCSE	OPD	Lloyd, Jessica	103130 - Animal Shelter	30-Jun-14	YES	Recruitment	Temporary project support for Brooklyn Basin project. Estimated end date extended to June 30, 2015.
22	TCSE	PBD	Ellsworth, Ellen	84421 - Administration Unit	9-Jun-14	YES	Assignment End	Subject matter expert on LRMS - Providing training to staff. Estimated end date March 2015.
23	TCSE	OPD	Fallehy, Deborah	103242 - Police Services Agency	15-Feb-14	YES	Assignment End	Assistance in City Clerks duplicate removals project. Estimated end date 12/31/2015. EE is PPT with DHS.
24	TCSE	PBD	Ford, Danny	84421 - Administration Unit	8-Jul-14	YES	Assignment End	
25	TCSE	CAO	Geddes, Dorothy	02331 - City Administrator/Employee Relations	24-Nov-14	YES	Assignment End	Providing administrative support to negotiations and ER staff.
26	ELDE	HCD	Hall, Pamela	89919 - HCD Administration Unit	27-May-14	YES	Assignment End	Temporary project support for Acela implementation project. Estimated end date January 31, 2015
27	TCSE	AUD	Hirasuna, Noriaki	07111 -City Auditor Unit	28-Oct-13	YES	Assignment End	Backfill for temporary vacancy due to employee leave. Estimated end date January 2015.
28	TCSE	OPD	Hunt, Shaun	107210 - Administration	18-Aug-14	YES	Recruitment	Pending Recruitment
29	TCSE	HSD	Jimenez, Javier	78311 - DHS Policy & Planning - Ceasefire	12-Apr-14	YES	Assignment End	Ceasefire Program Coordination. Estimated end date April 13, 2015.
30	TCSE	PBD	Johnson, Samuel	84421 - Administration Unit	23-Jun-14	YES	Assignment End	Estimated end date June 30, 2015
31	TCSE	OPD	Kisamov, Bela	103310 - Animal Services	16-Aug-14	YES	Assignment End	Estimated end date June 2015
32	ELDE	CAO	Klasse, Verdene	02211 - City Administrator's Office	31-Mar-14	YES	Recruitment	New Director; pending assignment of appropriate classification. Measure Y Committee Support - Assignment end date 3/30/2015

	TCSE/ELDE	DEPT	FULL NAME	ORG	CLASS DATE		RESOLUTION	NOTES
33	ELDE	FMA	Lee, Jacqueline	08721 - Treasury	1-Oct-14	YES	Assignment End	Assisting with Day to Day debt management and with the SEC Municipal Rule as well as Continuing Disclosure Oversight
34	ELDE	HSD	Ly, Ngoc	78235 - Food Services	2-Sep-14	YES	Assignment End	Addition of PT class to Salary Ordinance recommended. Under review for Council report.
35	TCSE	Mayor	McDonald, Pamela	01111 - Communications Unit	15-Oct-14	YES	Assignment End	Assisting Communications Director
36	ELDE	HCD	Ma, Susan	89919 - HCD Administration Unit	1-Oct-14	YES	Assignment End	Estimated end date is April 27, 2015
37	ELDE	CAO	Metzger, Benjamin	02331 - CAO Employee Relations Unit	8-Dec-14	YES	Assignment End	ELDE/Senior HR Analyst
38	TCSE	HSD	Pride, Angela	78411 - Community Housing	4-Aug-14	YES	Assignment End	Temporary assignment pending recruitment to fill permanent position.
39	TCSE	OPD	Quach, Kim	106510-Police Services Agency	4-Apr-14	YES	Assignment End	Temp support while incumbent on MLOA. TCSE estimated end date February 2015.
40	ELDE	DPB	Taylor, Allene	84111 - HCD Administrative Unit	27-Oct-14	YES	Assignment End	ELDE/Deputy Building Official while HRM develops permanent classification
41	TCSE	PWA	Vaughan, Richard	30541 - Equipment Services	27-Oct-14	YES	Assignment End	Restructuring of Equipment Parts 5050 Coliseum Way
42	ELDE	OPD	Walker, Adrian	106610 - Background & Recruiting	14-Nov-14	YES	Assignment End	Temporary administrative support
43	TCSE	PBD	Virtucio, Emma	08261-Controller's Office	11-Mar-14	YES	Assignment End	Project support of new Oracle system implementation. Estimated end date is March 2015.
	TCSE/ANNUITANTS	DEPT	FULL NAME	ORG	CLASS DATE	COMPLIANT?	RESOLUTION	NOTES
44	TCSE/Annuitant	Library	Barra-Gibson, Luisa	61231-Main Library	30-Jun-14	YES	Assignment End	Specialized assignment at AAMLO. CalPERS rules allow limited use, but until Oracle upgrade will continue to show on report.
45	TCSE/Annuitant	HSD	Andrade-Reed, Barbara	78232 - Head Start Unit	12-Nov-13	YES	Assignment End	Annuitant Supporting Head Start operations.
46	TCSE/Annuitant	OPD	Ayala, Edgardo	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
47	TCSE/Annuitant	HSD	Chaney-Williamson, Sylvia	78241 - SFSP Site Review	16-Jun-14	YES	Assignment End	Temp assignment providing vendor oversight and management of Mayor's Summer Jobs Program.
48	TCSE/Annuitant	OPD	Chey, Tae	106610 - Background & Recruiting	22-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
49	TCSE/Annuitant	OPD	Christmas, Ernest	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
50	TCSE/Annuitant	DHS	Corso, Debra	30112 - Administration	2-Sep-14	YES	Assignment End	Assignment End
51	TCSE/Annuitant	Mayor	Cowan, Richard	01111-Mayor	27-Jan-14	YES	Assignment End	Annuitant/Special Assistant to the Mayor
52	TCSE/Annuitant	OPD	Davis, Johnny	106610 - Background & Recruiting	19-Jan-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
53	TCSE/Annuitant	OPD	Denson, Benjamim	106610 - Background & Recruiting	17-Mar-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
54	TCSE/Annuitant	CAO	Dolese, Ellen	04211 - City Attorney Litigation Unit	8-Dec-14	YES	Pending Recruitment	Providing temporary support during examination process by HRM.
55	TCSE/Annuitant	OPD	Donovan, Daniel	101120 - Internal Affairs	2-Jan-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
56	TCSE/Annuitant	AUD	Edmonds, Michael	07111 - City Auditor	29-Sep-14	YES	Pending Election	Pending Election
57	TCSE/Annuitant	HRM	Estevez, Richard	05211 - Employment & Classification	9-Sep-13	YES	Assignment End	Providing temporary support of specialized Police classification assignments.
58	TCSE/Annuitant	OPD	Fisher, James	106610 - Background & Recruiting	12-Oct-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
59	TCSE/Annuitant	OPD	Flynn, Dana	106610 - Background & Recruiting	12-Oct-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
60	TCSE/Annuitant	OPD	Hannon-Orozco, Mercedes	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
61	TCSE/Annuitant	OPD	Hart, Rutherford	106610 - Background & Recruiting	22-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
62	TCSE/Annuitant	OPD	Hassna, Jeff	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
63	TCSE/Annuitant	OPD	Hicks, Mark	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
64	TCSE/Annuitant	OPD	Johnson, Carmen	106610 - Background & Recruiting	9-Nov-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
65	TCSE/Annuitant	OPD	Johnson, Steven	106610 - Background & Recruiting	9-Nov-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
66	TCSE/Annuitant	OPD	Leaks, Delores	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
67	TCSE/Annuitant	OPD	Lighten, Ronald	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
68	TCSE/Annuitant	Mayor	Lyles, Reginald	01111 - Mayor - Admin Unit	18-Nov-13	YES	Assignment End	Annuitant providing direct support to the Mayor regarding public safety policies. Estimated end date of 06/30/2014.
69	TCSE/Annuitant	OPD	McFarlane, Robert	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
70	TCSE/Annuitant	OPD	Mestas, Alfred	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
71	TCSE/Annuitant	Finance	Obligacion, Teresita	08721 - Treasury	21-Jan-14	YES	Assignment End	Providing temporary accounting support during permanent employee LOA.
72	TCSE/Annuitant	OPW	Ogbamichael, Letterbrhan	30244 - Administration	20-Jun-14	YES	Assignment End	Temporary accounting support pending permanent appointment. Departmental interviews scheduled early September. Estimated end date November 30, 2014.
73	TCSE/Annuitant	OPD	Parker, Norma	106610 - Background & Recruiting	17-Mar-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
74	TCSE/Annuitant	OPD	Parkinson, John	106610 - Background & Recruiting	17-Mar-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
75	TCSE/Annuitant	OPD	Pressnell, Edward	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU

	TCSE/ELDE	DEPT	FULL NAME	ORG	CLASS DATE		RESOLUTION	NOTES
76	TCSE/Annuitant	OPD	Quintero, Joseph Michael	106610 - Background & Recruiting	12-Oct-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
77	TCSE/Annuitant	Council	Sanders, West, Sandra	00211 - City Council District 2	5-Apr-14	YES	Assignment End	Estimated end date December 31, 2014
78	TCSE/Annuitant	OPD	Taylor, Mayumi	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
79	TCSE/Annuitant	OPD	Thomas, Mark	106610 - Background & Recruiting	18-Jan-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
80	TCSE/Annuitant	OPD	Valladon, Robert	106610 - Background & Recruiting	17-Mar-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
81	TCSE/Annuitant	OPD	Vaughn, John	106610 - Background & Recruiting	23-Sep-13	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
82	TCSE/Annuitant	OPD	Viglienzone, Thomas	106610 - Background & Recruiting	18-Jan-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
83	TCSE/Annuitant	OPD	Williams, Ashlei	106610 - Background & Recruiting	18-Jan-14	YES	OPOA MOU Provision	Annuitant supporting background investigations per OPOA MOU
84	TCSE/Annuitant	Finance	Zapanta, Perla	08721 - Treasury	21-Jan-14	YES	Assignment End	Providing training to new incumbent of permanent position.

TCSE/ELDE Rules Compliance





MEMORANDUM

DATE: January 15, 2015

TO: The Honorable Civil Service Board **FROM:** Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Kip Walsh, Human Resources Manager, Recruitment & Classification

THROUGH: Anil Comelo, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Classification Specification for the Classification of Engineer, Civil Principal

Based upon a classification review at the request of the Public Works Department, staff has proposed a new classification specification for the classification of **Engineer, Civil Principal**.

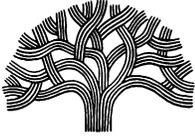
The existing draft has been used for several recruitments in the past. With that document as a foundation, several refinements have been proposed. Classification titles and references to the department have been corrected. Acknowledgement of the classification's exempt status has been added to the Distinguishing Characteristics section. The minimum qualifications have been modified and now include more descriptive language regarding the desirable experience and expertise. Lastly, several formatting changes will bring the document into alignment with the current classification specification template.

There are no current vacancies. However, the new classification specification will be used for future recruitment efforts.

The International Federation of Professional and Technical Engineers Union (IFPTE, Local 21) was notified of the proposed new classification specification. City staff and union representatives met on January 6, 2014. Union representatives planned to close the loop with incumbents after that meeting to ensure there were no issues or concerns with the proposed classification specification. The union confirmed via email on January 12, 2015 that there are no objections to the proposed classification specification.

Staff recommends that the Civil Service Board approve the proposed new classification specification for Engineer, Civil Principal.

Attachment: Proposed new classification specification for Engineer, Civil Principal



City of Oakland

DRAFT

PRINCIPAL CIVIL ENGINEER

Class Code: ET117 FTE

Exempt

DEFINITION

Under general direction in the Public Works Agency/Department, plans, organizes, manages and directs the work of an engineering section/division; manages the work of staff in design, construction, seismic safety, construction inspection, plan review and permit processing; manages large construction projects; directs the drafting of ordinances and resolutions; and trains and supervises assigned staff; ~~P~~ performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

This is a ~~section-head~~ division manager classification with the responsibility for overall administration of an engineering function of the division, including a variety of engineering design, construction, surveying, drafting, construction inspection, contract management and coordination activities. Pursuant to the Oakland Charter 902(f) and Oakland Municipal Code, this position is exempt from the regulations of the Civil Service Board. This classification is distinguished from ~~Deputy Director of Assistant Director, Public Works or Deputy Director/Building Official of Planning and Building~~, which is a bureau or division head.

~~The i~~ncumbent receives direction from an Assistant Deputy Director, of Public Works or Deputy Director/Building Official of Planning and Building and. ~~E~~xercises direction over Supervising Civil Engineers, professional, technical and assigned clerical staff.

EXAMPLES OF DUTIES - *Duties may include, but are not limited to, the following:*

Plan, organize, manage and direct, through subordinate supervisors, the work of an engineering section engaged in design, construction, plan review, permit processing or contract administration work.

Direct and review the preparation and examination of engineering plans, specifications, designs, cost estimates and legal descriptions for a variety of construction and maintenance projects.

Direct the preparation of a variety of studies and reports relating to current and long-range City capital improvement and maintenance needs and develop specific proposals to meet them.

Plan and direct project management activities for a variety of capital improvement and maintenance projects, including the preparation of plans, specifications and designs and compliance with technical and legal requirements; negotiate contracts; approve change orders and progress payments.

Ensure adherence to codes, regulations and guidelines governing engineering activities.

Direct the preparation and administration of the ~~section~~-division budget.

Direct the selection, supervision and work evaluation for section staff; provide for staff training and development.

Develop and direct the implementation of goals, objectives, policies, procedures and work standards for the section.

Develop and implement management systems, procedures and standards for program evaluation.

Prepare or review reports for the City ~~Administrator~~Manager, City Council or commissions; work closely with Council and other public and private groups to explain or coordinate plans for proposed engineering projects and to respond to their concerns.

Coordinate the work of the section with other City departments, outside agencies, contractors and concerned citizens.

Monitor developments related to public works engineering, evaluate their impact on City operations and implement policy and procedure improvements.

QUALIFICATIONS KNOWLEDGE AND ABILITIES

- ~~Extensive knowledge of p~~Principles and practices of civil engineering design and construction.
- ~~Extensive knowledge of t~~Theories, principles, techniques, materials and equipment used in construction and maintenance.
- ~~Extensive knowledge of a~~Administrative principles and methods, including goal setting, program development and implementation and tracking, and employee supervision.
- ~~Extensive knowledge of l~~Legal guidelines for public work engineering activities.
- ~~Extensive knowledge of the p~~Principles and practices of contract administration and project management and evaluation.
- ~~Extensive knowledge of the p~~Principles and practices of budget development and administration.
- ~~Extensive knowledge of s~~Safety rules, procedures, and practices.
- ~~Considerable knowledge of e~~Computer systems and applications.
- ~~Ability to m~~Manage and direct a large public works engineering program.
- ~~Ability to p~~Plan, organize, direct and coordinate a variety of functional specialties with overlapping work areas.
- ~~Ability to s~~Select, motivate and evaluate staff and provide for their training and professional development.
- ~~Ability to a~~Analyze complex technical and administrative engineering problems, evaluate alternative solutions and recommend or adopt effective courses of action.
- ~~Ability to d~~Develop and implement goals, objectives, policies, procedures, work standards and internal controls.

- ~~Ability to e~~Communicate effectively orally and in writing.
- ~~Ability to p~~repare clear and concise reports, correspondence and other written materials.
- ~~Ability to e~~xercise sound independent judgment within general policy guidelines.
- ~~Ability to e~~stablish and maintain effective work relationships with those contacted in the performance of required duties.

MINIMUM QUALIFICATIONS EDUCATION AND EXPERIENCE

~~Any combination of education and experience that would likely provide the required knowledge and abilities may be qualifying. A typical way to obtain the knowledge and abilities is:~~

The following qualifications are guidelines, as the appointing authority has broad discretion in filling positions in this classification.

Education:

A Bachelor's degree from an accredited college or university in civil engineering or a closely related field.

Experience:

~~Three years of experience comparable to Supervising Civil Engineer in the City of Oakland.~~
Three- years of progressively responsible experience in design and construction management of civil engineering projects, drafting of ordinances and resolutions, and contract and budget administration, including at least one year of supervisory experience.

LICENSE OR CERTIFICATE

Incumbent in this position may be expected to operate automotive vehicles in the performance of assigned duties. Due to assignments and hours worked, public transportation may not be an efficient method for traveling to required locations. Individuals appointed may be required to maintain a valid California Driver's License while employed.

Possession of a Certificate of Registration as a professional Civil Engineer in the State of California.

OTHER REQUIREMENTS

None.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY			
Established: / /	CSB Resolution #:	Salary Ordinance #:	
Exempted: Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:		
Revision Date: / /	CSB Resolution #:		
Re-titled Date: / /	CSB Resolution #:	Salary Ordinance #:	
(Previous title(s):)			



MEMORANDUM

DATE: January 15, 2015

TO: The Honorable Civil Service Board **FROM:** Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Kip Walsh, Human Resources Manager, Recruitment & Classification

THROUGH: Anil Comelo, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Classification Specification for the Classification of Case Manager,
Supervising

Based upon a classification review at the request of the Human Services Department, staff has proposed a new classification specification for the classification of **Case Manager, Supervising**.

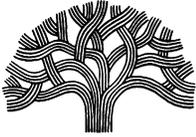
The existing draft has been used for several recruitments in the past. With that document as a foundation, a variety of refinements have been proposed throughout. The minimum qualifications have been modified and now include more descriptive language regarding the desirable experience and expertise – the language is in compliance with state standards and includes mention of a waiver in lieu of a Master’s degree. The “Other Requirements” section has been added. Lastly, applicable formatting changes will bring the document into alignment with the current classification specification template.

There is currently one vacancy. Recruitment efforts will be initiated to fill the vacancy using the newly adopted classification specification.

The International Federation of Professional and Technical Engineers Union (IFPTE, Local 21) was notified of the proposed new classification specification. City staff and union representatives met on January 6, 2014. The union confirmed via email on January 9, 2015 that there are no objections to the proposed classification specification.

Staff recommends that the Civil Service Board approve the proposed new classification specification for Case Manager, Supervising.

Attachment: Proposed new classification specification for Case Manager, Supervising



CITY OF OAKLAND

SUPERVISING CASE MANAGER

Class Code: SC113 FTE

Civil Service Classified

DEFINITION

Under direction in the ~~Department of~~ Human Services Department, supervises case management services to frail seniors and functionally-impaired adults, including psychosocial ~~or psychosocial~~ health assessments, certifications, care plan developments and implementations, purchases and arrangements of client services, monitoring of clients, home visits, and documentation; may oversees daily operations of directs the Intake/Information and Referral unit; trains and supervises assigned staff; and performs related work as ~~required~~ assigned.

DISTINGUISHING CHARACTERISTICS

This is a first-line supervisory classification. The incumbent is responsible for the day-to-day operations associated with providing case management services. This is a classification in the Case Manager series and can be distinguished from Case Manager I and Case Manager II, which are entry-level and journey-level classifications respectively.

The incumbent receives general supervision from the Senior Services Supervisor/Manager, and exercises general supervision over the Case Manager I, Case Manager II, Nurse Case Manager, and assigned clerical staff.

EXAMPLES OF DUTIES – *duties may include, but are not limited to the following:*

Monitor daily case management activities of Case Managers and Nurse Case Managers; track number of clients enrolled, served, discharged, certifications, home visits, and cost/client.

Convene weekly team care-plan conferences to review and approve care plans and to assure quality, appropriateness, and cost effectiveness of services.

Complete psychosocial assessments as needed and review ~~or psychosocial health~~ all assessments, reassessments, certifications and recertifications.

~~Arrange and/or order~~ Approve services ordered by Case Management staff as detailed in the care plan.

Supervise the Medical Management Program for certain clients; review and record medication flow sheets; provide feedback to Case Managers regarding status of client.

Conduct joint home visits with Case Managers to enroll new clients observe and evaluate performance and provide training and development pathways.

Supervise the Intake/Information and Referral unit.

Select, train, supervise, and evaluate subordinate staff.

Resolve conflicts between staff, clients, and clients' families.

Develop, maintain, and update case management systems, charts and files; maintain confidentiality of information.

Maintain a resource file or index to use for service arrangements, purchase services, information,

referrals or consultations.

Ensure that Case Management staff Enters client information, care plans, and case notes into a manual or computer-based file per California Department of Aging (CDA) standards.

Provide senior and long-term-care information, referral or consultation services to the public.

QUALIFICATIONS KNOWLEDGE AND ABILITIES

Knowledge of:

- Components of case management and emerging long-term-care systems.
- Available resources in the City, county, and state for long-term care.
- State and federal regulations on social and health service programs.
- Time and records management for case workers.
- Interviewing techniques.
- Case note standards and techniques.
- Computer systems and software.

Ability to:

- Relate to the needs of multiracial-cultural low income frail seniors, functionally-impaired adults, and their families.
- Make an accurate assessment of client's mental, social, and physical status.
- Utilize effective oral and written communication skills.
- Identify and solve problems on a timely basis.
- Maintain accurate and up-to-date records.
- Supervise, train and evaluate assigned staff.
- Establish and maintain effective work relationships with those contacted in the performance of required duties.

EDUCATION AND EXPERIENCE MINIMUM QUALIFICATIONS

Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable:

Education:

A Master's degree from an accredited college or university in ~~the~~ social work~~sciences~~, nursing ~~sciences~~, gerontology, psychology, counseling, sociology, rehabilitation or a related field.

NOTE: An exemption in lieu of a Master's degree may be obtained from the California Department of Aging. Candidates must possess a Bachelor's degree from an accredited college or university in social work, counseling, rehabilitation, nursing, gerontology, psychology, or sociology and the requisite experience for performing both administrative and clinical supervision duties as outlined in the California Department of Aging MSSP Site Manual).

Experience:

Two years of progressively responsible experience comparable to Case Manager II or Nurse Case Manager in the City of Oakland or a similar position performing case (care) management with frail seniors and/or functionally impaired adults, demonstrating expertise and ability as evidenced by

successfully carrying out related responsibilities and supervising and training staff and two years of experience in a supervisory role. ~~Previous experience in a lead or supervisory capacity is highly desirable.~~

LICENSE OR CERTIFICATE

Successful incumbents in this job are expected to operate an automotive vehicle in the performance of the assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be a cost-effective method for traveling to the various locations required. Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the travel to various locations or transport equipment in a timely manner as required in the performance of duties.

OTHER REQUIREMENTS

Depending on nature of assignment, candidates who receive offers of employment may be required to submit fingerprints, undergo a criminal record clearance, and have a physical examination including a TB screening.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY

Established: / /	CSB Resolution #:	Salary Ordinance #:
Exempted: Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:	
Revision Date: / /	CSB Resolution #:	
Re-titled Date: / /	CSB Resolution #:	Salary Ordinance #:
(Previous title(s):)		



MEMORANDUM

DATE: January 15, 2015

TO: The Honorable Civil Service Board **FROM:** Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Kip Walsh, Human Resources Manager, Recruitment & Classification

THROUGH: Anil Comelo, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Classification Specification for the Classification of Treasurer

Based upon a classification review at the request of the Office of the City Administrator, staff has proposed re-titling **Manager, Treasury** to **Treasurer** and revising the existing classification specification.

The title change is necessary to bring it into alignment with trends in the industry. Proposed modifications to the classification specification include replacing references to the title and correcting department and agency names. The remainder of the classification specification is still current.

This classification is not represented by a union. Therefore, a meet and confer was not required.

Staff recommends that the Civil Service Board approve the title and classification specification for Treasurer as amended.

Attachment: Revised classification specification for Treasurer



TREASURER MANAGER

Class Code: EM206 FTE

Exempt

DEFINITION

Under administrative direction in the Finance ~~Department and Management Agency (FMA)~~, uses operational decision making in the direction and coordination of work in the Treasury ~~Division Bureau~~; plans, organizes, manages, and directs the review and implementation of the City's major Treasury ~~Division Bureau~~ projects; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

The ~~Manager~~, Treasurer is a bureau division-head classification with responsibility for the overall administration of the Treasury ~~Division Bureau~~. Pursuant to the Oakland Charter 902(b) and Oakland Municipal Code, this position exempt from the regulations of the Civil Service Board. This classification is distinguished from the ~~Agency Director of, Finance & Management~~, which is responsible for all ~~divisions-bureaus~~ of ~~the Finance Department~~ FMA.

The incumbent receives administrative direction from the ~~Agency Director of, Finance & Management~~ and exercises direction over professional, technical and clerical staff in the Treasury ~~Division Bureau~~.

EXAMPLES OF DUTIES - *Duties may include, but are not limited to the following:*

Plan, organize, manage, and direct, through subordinates, the work of the Treasury ~~Division Bureau~~.

Formulate policies and procedures to issue and maintain municipal bonds; answer questions and provide service to bond holders.

Conduct fiscal analyses of special assessment districts, tax ordinances, rate structures, and other methods of raising funds; make recommendations.

Oversee the investment of City and Oakland Redevelopment Successor Agency (ORSA) funds; maximize returns within established guidelines.

Prepare or direct the preparation of studies and reports relating to bond issues and special projects; develop specific recommendations.

Develop and direct the implementation of goals, objectives, policies, procedures, and work standards for the ~~division bureau~~.

Direct the preparation and administration of the ~~division bureau~~ budget.

Direct the selection, supervision, and evaluation of ~~division bureau~~ staff; provide for staff training and development.

Maintain contact with bond holders, trustees, investment bankers, lawyers, and stock brokers.

KNOWLEDGE AND ABILITIES

Knowledge of:

- Principles and practices of finance and investment management.
- Administrative principles and methods, including goal setting, program development and implementation, and employee supervision.
- Public contact and effective banking relations.
- Computer systems and financial software.
- Budget development and administration.
- Principles of training and staff development.

Ability to:

- Manage and direct a comprehensive debt management, investment portfolio, and fundraising program
- Conduct complex fiscal analyses using financial software
- Select, train, motivate, and evaluate assigned staff.
- Exercise sound, independent judgment within general policy guidelines
- Communicate effectively orally and in writing.
- Prepare and administer a ~~unit~~ budget
- Maintain accurate records
- Prepare clear, concise reports, correspondence, and other written materials.
- Establish and maintain effective work relationships with those contacted in the performance of required duties.

MINIMUM QUALIFICATIONS

The following qualifications are guidelines, as the appointing authority has broad discretion in filling positions in this classification.

Education:

A Bachelor's degree from an accredited college or university in finance, business administration, or a related field. A Master's degree is desirable.

Experience:

Three (3) years of progressively responsible supervisory experience in investment banking or financial management. Municipal finance experience is desirable.

LICENSE OR CERTIFICATE

Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY

Established: 2/10/2011 CSB Resolution #: 44377 Salary Ordinance #:

Exempted: Y N Exemption Resolution #: 902(b)

Revision Date: / / CSB Resolution #: Salary Ordinance #:
Re-titled Date: / / CSB Resolution #: Salary Ordinance #:

(Previous title(s): n/a)



STAFF REPORT

DATE: January 15, 2015

TO: THE HONORABLE CIVIL SERVICE BOARD

FROM: Jaime Pritchett, Principal Human Resource Analyst

THROUGH: Kip Walsh, Human Resources Manager, Recruitment & Classification

THROUGH: Anil Comelo, Director of Human Resources Management

SUBJECT: Quarterly Update Regarding Pending Classification Studies Pursuant to Rule 3.04(f) of the Personnel Manual (Civil Service Rules)

The Personnel Manual (Civil Service Rules) section 3.04 (f) “Quarterly Updates” requires that the Personnel Director provide quarterly updates regarding outstanding Classification Studies to the Board and include an explanation of the delay for all studies that have been in progress for more than one year. The Board was last provided with a report in October 2014. This report also provides an update on classification specifications that are currently under review.

Classification Studies

Attachment A is a report of all outstanding classification studies for the quarter ending December 31, 2014. During this reporting period, six (6) studies were completed, one (1) study was canceled, and three (3) new studies were received. There are now fifteen (15) active classification studies involving twenty-one (21) incumbents, of which one study has passed the one-year mark and is overdue. It is important to note that the study of Management Interns (6 incumbents) and the Environmental Services Intern (one incumbent) is related to clarification of whether the classifications are exempt from Civil Service. Staff met with representatives from the International Federation of Professional and Technical Engineers (IFPTE, Local 21) on January 6, 2015 to discuss preliminary recommendations and next steps; another meeting has been scheduled for January 22, 2015. Additional meetings are expected during the first quarter of 2015 to fully explore potential resolutions.

EXPLANATION OF DELAYS

Only one study remains that has passed the one-year mark:

- Management Interns & Environmental Services Intern – citywide (six incumbents and one vacancy)

The study of full time intern classifications (Management Intern and Environmental Services Intern) was initiated by Human Resources Management as part of the overall effort to gain clarity and to properly manage classifications that are exempt from Civil Service. The Civil Service Board records show that the classification of Management Intern was formally exempted under the provisions of Charter section 902(f), but the record also shows that as part of the rationale for exempting the classifications, assignments are to be for a duration not to exceed two years. There are currently several incumbents whose assignments have extended well past the two year mark. HRM has finished studying the assignments of the incumbents and finalized preliminary recommendations as to the appropriate classification for work that clearly fills an

CIVIL SERVICE BOARD

Subject: Quarterly Classification Study Report

Date: January 15, 2015

Page 2

ongoing operational need. HRM formally notified the union on December 9, 2014 and held the initial meeting with IFPTE Local 21 on January 6, 2015 to make recommendations as to the appropriate way of resolving the classification issues. The next meeting will occur on January 22, 2015 and subsequent meetings are expected.

Note: The classification study for Winifred Walters was received on November 27, 2013 and became overdue on November 27, 2014. The final findings were issued on December 29, 2014. This assignment is no longer pending.

Classification Specification Review

Attachment B is a report of outstanding requests for classification specification reviews for the quarter ending December 31, 2014 showing a total of seventy-three (73) classifications under review. During this reporting period there were four (4) classification revisions or creations completed and approved by the Civil Service Board. There are three (3) classifications being advanced by HRM to the Board for the January 15, 2015 meeting; an additional eight (8) are in the queue for discussion with the representative union and advancement to the Board next month; there are thirty-four (34) classification specification reviews assigned and under review by analysts; and there are an additional twenty-four (24) for which HRM has received requests that have not yet been assigned.

Status	Qty
Approved by CSB or Closed During Quarter	4
Scheduled to CSB for Approval	3
Under Review for Scheduling of Meet & Confer with Representative Union	8
Assigned to Analyst for Review	34
Pending for Assignment	24
TOTAL	73

For questions regarding this report, please contact Jaime Pritchett, Principal Human Resource Analyst, at (510) 238-4735.

Attachment A – Classification Studies (Desk Audits) as of December 31, 2014

Attachment B – Classification Specifications under review as of December 31, 2014

**City of Oakland - Human Resources Management
Classification Studies**

ATTACHMENT A

	Department	Classification	Date Received	Date Complete	Pending 1+ yr?	Status
1	CITYWIDE	Management Intern & Environmental Services Intern	9/17/2012		Yes	Initiated by HR Director related to Local 21 MOU side letter and the exempt status of the intern classification. Pending further discussion with Local 21 regarding the Management Intern class. All incumbent and supervisor meetings have been conducted. Preliminary recommendations have been discussed with departmental staff and the union has been contacted. Held first meeting with the union regarding recommendations on 1/6/15 and scheduled the next meeting for 1/22/15.
2	PI - Project Imp	Program Analyst I	11/6/13	10/24/14	No	Completed.
3	LIBRARY	Development Specialist III	11/27/13	12/29/14	Yes	Completed.
4	OPR	Recreation Program Director	12/13/13	10/24/14	No	Completed.
5	CAO	Contract Compliance Officer, Assistant	1/6/14	12/29/14	No	Completed.
6	OPR	Recreation Specialist II	1/23/14	12/19/14	No	Completed.
7	LIBRARY	Librarian I	2/20/14		No	Preliminary findings with Class Supervisor for review.
8	PWD	Office Assistant II	3/31/14		No	Study is in progress; preliminary findings will be submitted during January 2015.
9	OPD	Police Records Specialist	4/2/14	12/29/14	No	Completed.
10	OFD	Fire Communications Supervisor	4/18/14		No	Preliminary findings with Class Supervisor for review.
11	HCD	Office Assistant II	4/14/14		No	Study is in progress; preliminary findings will be submitted during January 2015.
12	HCD	Office Assistant II	4/14/14		No	Study is in progress; preliminary findings will be submitted during January 2015.
13	CAO	Cable TV Operations Technician	5/16/14		No	Preliminary findings with Class Supervisor for review.
14	HRMD	Benefits Technician	6/30/14		No	Preliminary findings with Class Supervisor for review.
15	OPRD	Recreation Center Director	7/8/14		No	Preliminary findings with Class Supervisor for review.
16	OPD	Animal Control Officer	7/10/14		No	Preliminary findings with Class Supervisor for review.
17	PWD	Environmental Program Specialist	6/30/14	11/13/14	No	Cancelled; employee resigned.
18	PBD	Engineering Technician II	9/11/14		No	Pending assignment to staff.
19	HRMD	Human Resource Technician	9/23/14		No	Pending assignment to staff.
20	HSD	Office Assistant II	10/16/14		No	New assignment.
21	PBD	Account Clerk III	12/1/14		No	New assignment.
22	HSD	Office Assistant II	12/17/14		No	New assignment.

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

CLASS	DEPT	TITLE	REP	TYPE	NOTES
CLOSED THIS QUARTER					
NEW	HRMD	Benefits Coordinator	UM2	NEW SPEC	Approved at 10/16/14 CSB
NEW	OFD	Fire Fighter Trainee	US1	NEW SPEC	Approved at 10/16/14 CSB
AP126	HSD	Case Manager I	TW1	SPEC REVISION	Approved at 11/6/14 CSB
AP308	CAO	Real Estate Agent	TF1	SPEC REVISION	Approved at 12/18/14 CSB
SCHEDULED					
SC113	HSD	Case Manager, Supervising	UH1	SPEC REVISION	Scheduled for 1/15/15 CSB
ET117	CITYWIDE	Engineer, Civil Principal	UM1	SPEC REVISION	Scheduled for 1/15/15 CSB
NEW	FINANCE	Treasurer (formerly Manager, Treasury)	UM1	NEW SPEC	Scheduled for 1/15/15 CSB
PENDING MEET & CONFER					
PP113	HSD	Early Childhood Center Director	SD1	SPEC REVISION	Coordinating meeting dates with Local 1021
PP114	HSD	Early Childhood Instructor - Head Start Instructor	SD1	SPEC REVISION	Coordinating meeting dates with Local 1021
NEW	HSD	Early Childhood Substitute Instructor	TBD	NEW SPEC	Coordinating meeting dates with Local 1021
NEW	HSD	Early Head Start Instructor	SD1	NEW SPEC	Coordinating meeting dates with Local 1021
PP123	HSD	Family Advocate	SD1	SPEC REVISION	Coordinating meeting dates with Local 1021
NEW	FINANCE	Purchasing Manager	UM1	NEW SPEC	Meeting scheduled for 1/22/15
AF053	FINANCE	Purchasing Supervisor	UH1	SPEC REVISION	Meeting scheduled for 1/22/15
PP144	HSD	Senior Services Program Assistant	TW1	SPEC REVISION	Coordinating meeting dates with Local 1021
IN PROGRESS					
AP210	CAO	Assistant Police Program Auditor (Internal Auditor III)	TW1	SPEC REVISION	Draft developed; pending sup review & dept feedback.
PS107	OPD	Captain of Police	UN2	NEW SPEC	Drafting new class spec
EM122	OPD	Chief of Police	UN1	NEW SPEC	Drafting new class spec
EM237	OPD	Chief of Police, Assistant	UN1	NEW SPEC	Drafting new class spec
PP108	HSD	Child Education Coordinator	UH1	SPEC REVISION	New federal regulations need to be incorporated
TR118	PWD	Construction & Maintenance Mechanic	SB1	SPEC REVISION	New assignment.
EM135	OPD	Deputy Chief of Police	UN2	NEW SPEC	Drafting new class spec
NEW	ETHICS COMM	Deputy Director of Public Ethics	TBD	NEW SPEC	Drafting new class spec
AP252	CITYWIDE	Development Specialist III	TW1	SPEC REVISION	Pending analyst assignment.
NEW	CAO	Employee & Labor Relations Analyst, Senior	TBD	NEW SPEC	Drafting new class spec
PP121	PWD	Environmental Services Intern	TW1	NEW SPEC	Exempt clarification follow-up; audits of incumbents pending.
SS201	PWD	Equipment Parts Technician	SC1	SPEC REVISION	Department determining whether to proceed with initial request
PS125	OFD	Fire Fighter	FQ1	SPEC REVISION	Revise existing spec

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

ATTACHMENT B

CLASS	DEPT	TITLE	REP	TYPE	NOTES
PS183	OFD	Fire Fighter Paramedic	FQ1	SPEC REVISION	Revise existing spec
TR146	PWD	Heavy Equipment Operator	SB1	SPEC REVISION	Revise existing spec
AP214	OPLD	Librarian I	SD1	SPEC REVISION	Preparing proposed spec revisions for department review
AP217	OPLD	Librarian II	SD1	SPEC REVISION	Preparing proposed spec revisions for department review
AP220	OPLD	Librarian, Senior	SD1	SPEC REVISION	Preparing proposed spec revisions for department review
SC172	OPLD	Librarian, Supervising	UH1	SPEC REVISION	Preparing proposed spec revisions for department review
AP221	OPLD	Library Aide	SD1	SPEC REVISION	Preparing proposed spec revisions for department review
AP223	OPLD	Library Assistant	SD1	SPEC REVISION	Preparing proposed spec revisions for department review
AP224	OPLD	Library Assistant, Senior	SD1	SPEC REVISION	Preparing proposed spec revisions for department review
PS194	OPD	Lieutenant of Police	PP1	NEW SPEC	Drafting new class spec
SS142	CITYWIDE	Management Intern	TA1	NEW SPEC	Exempt clarification follow-up; audits of incumbents pending.
PS161	OPD	Police Cadet	UG1	NEW SPEC	Draft developed; pending sup review & dept feedback.
PS162	OPD	Police Communications Dispatcher	SC1	SPEC REVISION	Finalizing proposed spec revisions with department
PS163	OPD	Police Communications Operator	SC1	SPEC REVISION	Finalizing proposed spec revisions with department
PS164	OPD	Police Communications Supervisor	UH1	SPEC REVISION	Finalizing proposed spec revisions with department
PS168	OPD	Police Officer		SPEC REVISION	Preparing proposed spec revisions for department review
AP434	OPD	Police Program & Performance Auditor	UM2	SPEC REVISION	Draft developed; pending sup review & dept feedback.
NEW	ETHICS COMM	Public Ethics Analyst	TBD	NEW SPEC	Drafting new class spec
NEW	ITD	Public Safety Communications Technician	TBD	NEW SPEC	Changeover in dept staff; confirm request.
PS179	OPD	Sergeant of Police	PP1	NEW SPEC	Drafting new class spec
NEW	FINANCE	Treasurer, Assistant	UM2	NEW SPEC	Drafting new class spec

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

CLASS	DEPT	TITLE	REP	TYPE	NOTES
PENDING ASSIGNMENT					
EM118	CITYWIDE	Assistant to the Director	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
NEW	PBNPD	Building & Planning Director	UK1	NEW SPEC	Pending analyst assignment.
EM143	PBNPD	Building Official	TBD	NEW SPEC	Changeover in dept staff; confirm request.
EM127	CLERK	City Clerk, Assistant	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
MA113	CAO	Controller	UK2	DRAFT/REVISE	Pending analyst assignment.
NEW	EWD	Director of Economic & Workforce Development	UK1	NEW SPEC	Draft pending CAO approval to advance.
EM154	HCDD	Director of Housing & Community Development	UK1	NEW SPEC	Draft pending CAO approval to advance.
SS120	ATTY	Exec Asst to Asst City Attorney	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
SS121	CAO	Executive Asst to the Assistant City Administrator	U31	SPEC REVISION	Draft pending CAO approval to advance.
SS126	CAO	Executive Asst to the City Administrator	U31	SPEC REVISION	Draft pending CAO approval to advance.
TC143	OFD	Fire Equipment Technician	SB1	SPEC REVISION	Changeover in dept staff; confirm request.
PS135	OFD	Firefighter/Fireboat Engineer	FQ1	SPEC REVISION	Turnover in HR staff; review of draft pending.
PS137	OFD	Firefighter/Fireboat Operator	FQ1	SPEC REVISION	Under dept review for US Coastguard licensing
SS129	HRM	Human Resource Clerk	TA1	SPEC REVISION	New assignment.
EM242	CAO	Inspector General	UK1	NEW SPEC	Initially approved by CSB 4/11/13; June 2013 - new revisions under discussion
NEW	OPLD	Literacy Program Manager	TBD	NEW SPEC	Changeover in dept staff; confirm request.
EM177	CAO	Manager, Contract & Employment Services	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
NEW	CAO	Neighborhood Services Program Manager	TBD	NEW SPEC	Pending analyst assignment.
SS164	CITYWIDE	Planning Intern/Housing Intern	UG1	SPEC REVISION	Broaden existing class to include Housing or merge with/revise Student Trainee. Cleanup and clarification of intern classifications.
NEW	CAO	Police Performance Audit Manager	UM1	NEW SPEC	Draft; pending CAO approval to advance.
TR174	PWD	Public Works Maintenance Worker	SC1	SPEC REVISION	Department determining whether to proceed with initial request
AF034	CAO	Real Estate Collections Officer	SD1	SPEC REVISION	Changeover in dept staff; confirm request.
TR180	PWD	Street Maintenance Leader	SC1	SPEC REVISION	Department determining whether to proceed with initial request
ET132	PWD	Surveying Technician	SC1	SPEC REVISION	New assignment.



MEMORANDUM

DATE: January 15, 2015

TO: The Honorable Civil Service Board

FROM: Kip Walsh
HR Manager, Recruitment & Class

THROUGH: Anil Comelo, Director of Human Resources Management
Secretary to the Board

SUBJECT: Appeal of Classification Study Results – Elvira Galang

Human Resources Management staff has been coordinating communication between the Secretary of the Civil Service Board (Personnel Director), the Appellant (Elvira Galang), and the Appellant's Representative Union (SEIU, Terry Meadows) regarding the appeal scheduled for the Civil Service Board's January 15, 2015 meeting. On Wednesday, January 7, 2015, after some back and forth communications, the Appellant sent an email, cc'ing her Union Representative and notifying us that she wished to have the appeal proceed to the Board on the basis of the documents submitted. She also stated that neither she nor her representative would be present. As a result, only the City will be making a presentation to the Board related to this appeal.

Walsh, Kip

From: Galang, Elvira
Sent: Wednesday, January 07, 2015 10:13 AM
To: Carey, Cecilia
Cc: 'Terry Meadows'; Walsh, Kip; Pritchett, Jaime
Subject: RE: Notice of Hearing Scheduled

Cecilia,

This is to confirm that I choose no. 3 , that is I want my appeal be heard without my presence and without the presence of my representative.

Thank you for asking.

Elvira P. Galang
OPW – Fiscal
Tel. No. 510-238-7925

From: Carey, Cecilia
Sent: Monday, January 05, 2015 9:14 AM
To: Galang, Elvira
Cc: 'Terry Meadows'; Walsh, Kip; Pritchett, Jaime
Subject: RE: Notice of Hearing Scheduled

Good Morning Elvira,

I need to confirm if:

1. You are cancelling your appeal.
2. Your representative will attend on your behalf.
3. If the Board will be hearing your appeal without you or your representative present.

Please confirm one of the three above.

Thank you,

Cecilia Carey

From: Galang, Elvira
Sent: Monday, January 05, 2015 8:44 AM
To: Carey, Cecilia
Cc: 'Terry Meadows'; Walsh, Kip; Pritchett, Jaime
Subject: RE: Notice of Hearing Scheduled

Cecilia,

This to acknowledge receipt of the Notice of Hearing of my appeal.

I am sorry I cannot attend the hearing.

Thank you.

Elvira P. Galang



STAFF REPORT

DATE: January 15, 2015

TO: THE HONORABLE CIVIL SERVICE BOARD

FROM: Jaime Pritchett, Principal Human Resource Analyst

THROUGH: Kip Walsh, Human Resources Manager, Recruitment & Classification

THROUGH: Anil Comelo, Director of Human Resources Management

SUBJECT: Report Regarding the Appeal of Classification Study Results for the Accountant II position held by Elvira Galang

RECOMMENDATION

Staff recommends that the Civil Service Board deny the appeal of classification study results for the Accountant II position held by Elvira Galang and uphold the findings of the Position Audit.

SUMMARY

At the request of the incumbent, an Accountant II position in the Oakland Public Works Department was evaluated to determine whether the position was appropriately classified or if the preponderance of work being performed demonstrated that the position should be reclassified to Accountant III. Human Resources Management (HRM) staff conducted a study of the position and issued a finding that the position was appropriately classified. The incumbent, Elvira Galang, has submitted to the Civil Service Board an appeal of HRM's findings. Staff recommends that the Civil Service Board deny the appeal of classification study results for the Accountant II held by Elvira Galang on the basis that the concerns raised and information provided by the appellant do not support a finding that the Position Audit conducted by the Human Resources Management Department should be overturned.

BACKGROUND

Elvira Galang, submitted a Position Description Questionnaire ("PDQ," Attachment A), which was received on March 13, 2013, requesting that her position be reclassified from Accountant II to Accountant III. Staff from the Human Resources Management Department (HRM) met with the appellant on February 28, 2014. A series of supervisor meetings were held on February 28, 2014 (current supervisor), March 4, 2014 (supervisor assigning additional work), and March 14, 2014 (former supervisor). The information was analyzed and the final findings were released to the appellant in a "Letter of Determination" and "Position Audit Report" on March 31, 2014. The appellant was informed of her right to appeal pursuant to Civil Service Rule Section 3.04 (e), and she submitted a request for appeal on April 21, 2014.

Per Civil Service Rule Section 3.04 (e), an employee who does not agree with the outcome of a classification study "shall have an opportunity to be heard by the Board before the Personnel Director's decision becomes final." All parties shall be able to present their positions orally or in

writing and the Board will issue “a final and binding decision regarding the classification issue in dispute.”

ANALYSIS

The purpose of a classification study is to evaluate the duties as assigned to the position (not the incumbent) and determine whether those duties align with the classification title as allocated to that position or more appropriately align with a different classification. As a rule of thumb, more than half of the assigned duties must be encompassed by a classification for it to be deemed a suitable match.

HRM staff conducted this assessment and the results demonstrated that the assigned duties align with the current classification – Accountant II. The full analysis is contained in the “Analysis & Justification” section of the Position Audit Report (Attachment B).

The Accountant II classification provides professional expertise in order to perform moderate to difficult accounting and auditing tasks, including the design and preparation of accounting, statistical, and narrative reports; to analyze, examine, interpret, and reconcile City accounting records; and to monitor financial records, grants, and contracts. In contrast, the Accountant III performs similar duties but in a lead, supervisory or specialized work on complex accounting tasks. The information collected during the study does not support the appellant’s assertion that the assigned work is being performed at the Accountant III level.

The appellant provided several reasons for appealing the decision (Attachment C). The City’s response to each of the appellant’s points is provided below.

Reason #1: The appellant states that 10 years of experience makes her qualified and eligible for an upgrade from Accountant II to Accountant III.

City response: The appellant possesses several years of education, experience and dedication to the position, which is no doubt valued by the organization. However, years of experience, knowledge, skills, education, supervisory ratings or any other performance, competency or evaluation are not factors considered within a classification study. A classification study does not evaluate the individual; rather, it evaluates the duties assigned to the position that is held by the individual. As such, factors that are more generally categorized as “performance and qualifications” are not factors considered within a classification study.

Reason #2: The appellant states that she is performing the same duties as an Accountant III. This employee retired and a portion of that workload was transferred to the appellant.

City response: As communicated in the classification study, HRM is in agreement that the appellant currently performs some out-of-class work and has assigned a value of 15% to this subset of duties. This finding provides the department with two options to address the appellant’s work. The department may either a) reassign the “15%” to the newly hired Accountant III in the work unit or b) allow the appellant to continue performing the work as it does not represent a majority of work completed, therefore not qualifying for a reclassification to a higher level position. Both options are permissible under the City’s Classification Plan.

Reason #3: A misunderstanding by the HR Analyst has led to an incorrect conclusion.

City response: The appellant appears to claim that the grant audit duties (constituting the 15%) have been incorrectly accounted for by the Analyst. As noted in Response #2, HRM has acknowledged that the subset of duties mentioned above more closely aligns with that of an Accountant III level. To ensure that duties are allocated at the appropriate level, HRM recommended reassigning these duties to the newly filled Accountant III position.

Reason #4: The work performed is different than that of other Accountant II staff.

City response: Variance between positions of any kind is expected and is often driven by organizational structure and business necessity – that is to say, incumbents within the same classification are likely to have many duties in common but their duties are not necessarily identical. However, assigned duties must be compared to the classification specification, not to other incumbents in the classification. The appellant must demonstrate that the majority of her assigned duties are captured by a different classification. HRM concedes that a portion of the duties are in fact representative of a higher level. The department has two options, discussed above, regarding how to address the assignment of those duties.

Reason #5: The appellant has indicated that she does not currently perform supervisory duties but would be willing to do so.

City response: The incumbent is not automatically excluded from a reclassification because of a lack of any one duty as listed in the classification specification. However, since there are no supervisory duties currently assigned, the case cannot be made in favor of the incumbent. As supervisory duties are often a clear distinction between classifications, this area was investigated and no evidence was found to support a reclassification from this perspective. Willingness to supervise staff is not a consideration in a classification study.

Reason #6: The appellant asserts that the duties performed in the 77.5% portion of her work (Duty Set A) is of the same complexity and nature as those duties listed in Duty Set B, thus the entire work function is that of an Accountant III level.

City Response: The duties discussed within Duty Set A were compared to the existing classification specifications for the Accountant II and Accountant III classifications. Within the PDQ and the appeal letter, the appellant has categorized this bulk of duties as “Prepare financial statements, revenue and expenses and fund balance reports for projects/grant clean up, closure and audit.” This overarching categorization of the job is well defined within the Accountant II Classification Specification.

Classifications in a series will overlap in terms of the work that needs to be completed within an organization. Furthermore, a position may be solely responsible for one task completely that makes up the entirety of the job or there may be responsibilities across multiple areas. When discussing level and complexity of a position, common factors to consider are: nature of work, scope of authority, complexity/variability/routineness of the task, and accountability. In the Accountant Series (I, II and III) the tasks are all oriented towards providing financial services but the aspects discussed above (e.g. scope, complexity, accountability, etc.) vary greatly in

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Date: January 15, 2015

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providing that service. There are a few key factors that separate an Accountant II from an Accountant III. Accountant III incumbents are expected to have responsibilities in one or more of the following areas:

- Most Complex Functions – planning, coordinating execution, oversight and prioritizing of accounting and auditing functions
- Lead Accountant Role – the outward-facing liaison that interacts with auditors, external agencies and other external stakeholders
- Supervisory Duties, as applicable – performance appraisal, hiring, firing, discipline, scheduling, work assignments

By contrast, the current Accountant II Classification Specification lists duties, skills and abilities that are similar in nature to the appellant's stated list of duties. Further, the appellant's examples do not substantiate that the majority of duties (the "77%") meet the criteria for an Accountant III as listed above. While the wording is not exactly the same, the scope, detail and level of responsibility of Duty Set A is commensurate with the Accountant II level, as per what has been presented in the PDQ.

In addition to this, the appellant and current/former supervisors were asked what the involvement was when auditing activities occurred in the past. All parties unanimously indicated that the appellant prepared information but was not a "liaison" between the department and external auditors. This is a distinct component of the audit function present within the Accountant III specification that is not present in the Accountant II specification.

Additionally, the current supervisor indicated that the current Accountant III was ultimately intended to acquire this lead-type role. Unfortunately in the absence of an Accountant III position, Duty Set B was assigned to and performed by the appellant. Now that the Accountant III position has been filled, it would be appropriate for the auditing function to be reassigned accordingly.

The appellant has not provided sufficient evidence that the work performed within "Duty Set A" (constituting the majority of the work) is reflective of Accountant III duties.

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RECOMMENDATION:

Staff recommends that the Civil Service Board deny the appeal of classification study results for the Accountant II position held by Elvira Galang on the basis that the concerns raised and information provided by the appellant do not support a finding that the Position Audit conducted by the Human Resources Management Department should be overturned.

For questions regarding this report, please contact Jaime Pritchett, Principal Human Resource Analyst, at (510) 238-4735.

Attachments

- A. Position Description Questionnaire from Elvira Galang that was received on March 13, 2013
- B. Letter of Determination and Position Audit Report that were prepared by the Human Resources Management Department and issued on March 31, 2014
- C. Written notice of appeal from Elvira Galang dated April 21, 2014
- D. Classification specification for Accountant II
- E. Classification specification for Accountant III



DEPARTMENT OF HUMAN RESOURCES MANAGEMENT
RECRUITMENT & CLASSIFICATION DIVISION



CLASSIFICATION/COMPENSATION
REQUEST FORM

REQUESTING AGENCY/DEPARTMENT: PWA -Administration	DIVISION/UNIT: Fiscal Services
REQUEST INITIATED BY: <input type="checkbox"/> Department <input checked="" type="checkbox"/> Employee <input type="checkbox"/> Department of Human Resources Management	

For all applicable action(s) requested, fill in corresponding section(s) below:

CLASSIFICATION STUDY: The scope of duties and responsibilities required by the position has changed. (e.g., previously non-supervisory and now supervises staff, including performance appraisals.) Attach a Position Description Questionnaire (PDQ) form.

Incumbent name: Elvira P. Galang	Phone: 510-238-7925
Current Classification Title: Accountant II	# of months in position: 82
Supervised by: Lucius Hatcher	Phone: 510-238-7928

CREATE NEW SPECIFICATION: General information about duties and responsibilities must be attached. A rough draft of the job description is desirable.

Possible title(s) for new classification:	
The duties are currently being performed: <input type="checkbox"/> No <input type="checkbox"/> Yes (fill out incumbent name below)	
Incumbent name (if applicable):	Phone:

UPDATE CLASS SPECIFICATION: The complexity of duties has changed requiring higher levels of knowledge, skills and abilities utilized on a regular and continuing basis AND/OR new requirements for education and training, experience or certification are necessary. Attach a brief description of changes.

Exact Classification Title:	Job Class Code:
-----------------------------	-----------------

COMPENSATION REVIEW: A survey of other jurisdictions/agencies is needed to compare the classification's pay rate and related information.

Exact Classification Title:	Job Class Code:
-----------------------------	-----------------

MANAGER APPROVAL: [Signature] DATE: 3/19/13
 AGENCY/DEPARTMENT DIRECTOR APPROVAL: [Signature] DATE: 4/22/13

Note: Once approved, please retain a copy for departmental records and forward the original including PDQ Parts I & II (if applicable) along with any supporting documentation to: Department of Human Resources Management, ATTN: Classification Supervisor, 150 Frank H. Ogawa Plaza, 2nd Floor. If you have any questions, please contact your DHRM SPOC for assistance.

FOR INTERNAL USE ONLY:

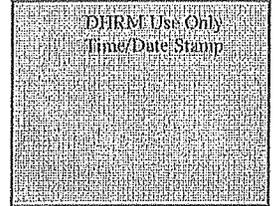
Class Supervisor to review: <u>[Signature]</u>	Complete Packet? <input checked="" type="checkbox"/> Yes - Assign to staff <input type="checkbox"/> No - Return to dept.	Date assigned: <u>2/5/14</u>	Analyst name: <u>E. Williams</u>	Due date: <u>3/7/14</u>
--	--	------------------------------	----------------------------------	-------------------------

2/5/14 E.W. Due: 3/7/14

RECEIVED
FISCAL SERVICES



DEPARTMENT OF HUMAN RESOURCES MANAGEMENT
RECRUITMENT & CLASSIFICATION DIVISION



Interoffice Letter

TO: City Employees
FROM: Classification Supervisor
RE: Policy on Classification Studies

Requests for Classification Studies can only be approved for incumbents that meet the following criteria:

1. The position held by the incumbent must be classified (not exempt from Civil Service).
2. The incumbent must have served at least one year in the position per Section 3.05 of the Personnel Manual.

A completed Position Description Questionnaire (PDQ) form must be submitted along with the Classification/Compensation Request Form to initiate your classification study. Upon receipt, DHRM staff will be assigned to conduct an analysis to determine if the position that you currently fill has been assigned to the correct job classification in the City's classification plan. Once your paperwork has been reviewed, the DHRM Analyst will contact you to set up a meeting to interview you and review your work products. This is commonly referred to as the "desk interview." A Position Audit Report will be issued, which verifies and augments the information you provided in the PDQ form along with additional information provided by your supervisor. Based on this analysis, our staff will make a recommendation regarding your position to your department head. It is important to understand that reclassification is not automatic, and an employee working in a position that performs duties outside of his/her assigned classification does not have the right to be placed into a higher level job.

Based upon the outcome of the classification study, the final recommendation may include any of the following options:

- A. No change in job classification is required. The position is appropriately classified.
- B. Some duties and responsibilities currently being performed by the incumbent are not appropriate for his/her current classification/position; the duties should be reassigned to others in the organization. The incumbent should remain as classified.
- C. The duties and responsibilities of the position are not consistent with the classification allocation, and the incumbent should be reclassified to a different classification.
 1. If reclassification to a higher grade is recommended and the department concurs, the incumbent may recognize an increase in salary. However, *it is not the City's policy to award retroactive pay.*
 2. If the analysis indicates that the incumbent should be reclassified to a lower position or in cases of a citywide or department-wide class study, the employee will be "Y" rated in compliance with Section 3.06b of the Personnel Manual. While this outcome is less common, it does occur.
- D. As specified in Section 3.04e of the Personnel Manual, in the event an incumbent does not agree with the outcome of her/his Classification study, the employee has the right to file an appeal within fifteen (15) working days of notice after which a hearing will be held and the Civil Service Board will issue a final decision in the matter.
- E. In the event the City of Oakland experiences a reduction-in-force to balance a budget deficit and if a higher classification is recommended, your new classification may be impacted.
- F. Any salary changes that result from a final classification action are effective one pay period following final approval and notification as described in Section 3.05d of the Personnel Manual.

I have read and fully understand this advisory:

Elvira P. Galang

Print Name

Elvira P. Galang

Signature of Incumbent

3/8/13

Date



DEPARTMENT OF HUMAN RESOURCES MANAGEMENT
RECRUITMENT & CLASSIFICATION DIVISION

POSITION DESCRIPTION QUESTIONNAIRE
PART I: INCUMBENT DATA

The purpose of this Position Description Questionnaire (PDQ) form is to obtain information about your current position including the duties you perform, your level of authority and responsibility, and the skills and abilities needed. The information you provide will be used to determine the correct classification of the position you hold. We recommend you first read through the entire document so that you understand the information we are asking for in each section. It is very important that you provide accurate, detailed information about your current job duties.

DIRECTIONS:

1. Please complete all sections of the questionnaire and give specific examples that accurately describe your work. Please review your answers for specificity and completeness.
2. When complete, make a copy for your own records and forward the original documents to your supervisor.
3. If you have any questions, please email the Classification Unit at class.comp@oaklandnet.com.

SECTION A - BACKGROUND INFORMATION

Name: Elvira P. Galang	
Email: egalang@oaklandnet.com	Phone Number: 510-238-7825
Department/Division/Unit: Administration- Fiscal Services	
Work Location Address: 3rd Floor Suite 3341 Daziel Building 250 FHOP	
Current Classification: Accountant II (Exact Title)	<input checked="" type="checkbox"/> FT <input type="checkbox"/> PPT <input type="checkbox"/> PT <input type="checkbox"/> Other:
Current Working Title, if applicable: (concurrent with present work duties being performed)	
# of months performing current duties: 36	Are you receiving "acting pay"? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If so, how long? Yes, before when the Accountant III was on vacation
Have you ever participated in a Classification Study, requested a desk audit, or been reclassified? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes, please provide the estimated date and describe the final outcome:	
Have you ever competed in a selection process for any other position with the City of Oakland? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes If yes, please specify for which recruitments using exact titles: Accountant III, Accounting Technician, Account Clerk III, Payroll Clerk II and III	

SECTION B - DUTIES

In one or two sentences, please state the overall purpose of your job:

To solve complex accounting and auditing problems. Provide fiscal assistance to managers, supervisors and other staff on day to day operations by processing/monitoring payment requests for constructions, professional services and other vendors in accordance with the contracts and agreements. Prepare financial statements and complex reports and train and direct other staff from other departments in the performance of their fiscal functions. Perform complex technical, auditing and accounting support with various Departments of the agency in the preparation of JVs, BCRs, financial reports, clean up and audits of Grant/Projects.

1. Please list the major and essential duties you currently perform and describe in detail what you do.
2. For each duty listed, provide your best estimate of the frequency by inserting the corresponding number that best describes the amount of time spent.
3. In the right hand column, provide your best estimate of the percent of your total working time normally spent on each task so that the total percentage for all duties = 100%.

Duties	Frequency 1 = Daily 2 = Weekly 3 = Monthly 4 = Quarterly 5 = Annually 6 = As Needed	
	Frequency	Percentage
1. To process/monitor payment requests for construction, professional services and vendors in a timely manner. Check the stamped approval information for the authorized signature. Check coding block against the PO Number in the Purchase Summary Inquiry and the amount to be paid against the current balance of the PO. If there is a discrepancy in the coding block and no sufficient fund or incomplete information, I call or e-mail the supervisor or staff who submitted the invoice. Recommend best solution to problem to facilitate processing. Fill out the Encumbrance Payment Request form. Submit the form together with the invoice and other supporting documents to the Supervisor for signature. Stamped Invoice urgent if needed. Make necessary number of copies. Submit payment to Accounts Payable. Log the payment request in the log sheet to monitor the balance of the Contract or Agreement. File the same on the Vendors file folder.	1 Select Frequency	100 36.00%
	Select Frequency	
	Select Frequency	
2. Prepare invoice on Hold Report on Insufficient Fund. Export the invoice on Hold Report from A/P module in browser. Save and format the Insufficient Fund on Hold report from text file to Excel spreadsheet. Email report to AP Supervisor, person/s who's initial appear in the description column and my supervisor. Receive email notification of the action taken with this regard. Make follow up if the same invoice number appears again in the succeeding report.	2 Select Frequency	00.50%
3. Create PO for new, extension of term and existing Contract and Professional Agreement. For new Contract/Agreement, receive e-mail request for accounting number with attached copy of Contract/Professional Agreement and documents from Department of Environment and Construction (DEC). Check the completeness of	Select Frequency 5	00.50%
	Select Frequency	
Total (must be add up to 100%):		100

DUTIES	FREQUENCY	PERCENTAGE
<p>the approved documents and the necessary attachments. Save documents; if not complete, request for the necessary document/s. Attached Documents in the Purchase Requisition Order (POR) in the P2P Oracle. Submit for Approval. Receive POR approval notification with the auto create PO Number. Open the PO to complete the Contract Purchase Order (CPO) . Reference the POR Number so the duly approved new Contract or Agreement is automatically attached to the CPO. Forward the CPO to Supervisor for Approval. Receive Notice of Approval. Check the T- Summary Schedule coding block if it is to be</p>		
<p>determined (TBD) or pre-determined. If TBD, notify the Department Requestors (DEC and ESD) of the approval of CPO. Create Standard PO when the invoice/s is/are received. Otherwise Create Standard Purchase Order (SPO) based on the information in the Summary T-Schedule. Reference CPO Number in the Related Documents column. Save the Document. PO Number is created. Submit to Supervisor for Approval. Fund Checks will pop up. if it passed the c the fund, check the SPO is forwarded to the Supervisor for approval.</p>		
<p>Upon receipt of notice of SPO approval from the Authorized Approving Officer, notify the departments (DEC and ESD) requestors. The SPO number is reference in the Approval portion of the Invoice.</p> <p>4. Prepare financial statements, revenue and expenses and fund balance reports for projects /grants clean up, closure and audit. A. Run the Trial Balance Summary Report II of the Grants/Project to date using the Oracle OAK GL City Wide . Print the Report . Export Report in browser. Save as text file.</p>	1	48.00%
<p>Format the Report in excel. Present the financial data in a Balance Sheet and Statement of Revenue and Expenditures format. Total all Assets and Liabilities. Get the difference between the two. The result is the Net Assets which must equal to the reported Net worth. Categorized Expenditures as Personnel Cost and Operating and Maintenance. Get the sub-totals and add the two together to get the total Expenditures. Total Asset minus total liabilities is equal to Net Operating Expenses. This must be equal to the</p>		
<p>Net worth /Fund Balance before Adjustment if any. Prepare necessary adjustments to arrive at the adjusted fund balance. B. Run Detail Summary II to clean the Cash Account Balance. Format the coding block in excel. Prepare the JV by reversing the entry Cash Account Balance. Submit JV for Approval.</p>		

DUTIES	FREQUENCY	PERCENTAGE
<p>Upload and get the ID number and note in the hard copy. Make a copy. Submit hard copy to Accounting. Run Detailed Trial Balance Summary II after the JV is posted. C.Run the Oak Detailed Report on Project[Grants for clean up, closure and audit .Use the parameter for Fund</p>		
<p>and Program code XXXX to ZZZZ,Organization, for account Number 40000 to 69999 and Project ,Prime Project to the last Sub-Project Number in use. Upload the Report and Save in Excel Format. Format by fund, and by project . Use Data Subtotal to format . Insert column for Balance for the sub-total. Analyze the Balance. Prepare the necessary Journal entries .Prepare supporting documents such as computation of overhead burden of employees for personnel costs adjustments. Assemble all copies of Cash Receipts, Journal Voucher (JV,) Invoices and other related documents to support the adjustments for Cash,</p>		
<p>Revenues and Expenditures and other related accounts. Analyze the authorized Budget for Revenues and Expenditures against the Actuals. Prepare the required type of BCR to move in or out of the Project the revenues and Expenditures to fund the JVs. Delete any excess Budget for closure and completed project. Submit Journal Vouchers and or BCRs for Approval. Upload JV and or BCR for Posting by Accounting and Budget Office. Note the ID Number of approval . Make copies of all documents. Submit the item/s to Accounting/Finance. Verify if JVs are posted.</p>		
<p>File copies of JV in the central file and in the existing Grant folder with Fiscal Services. Check if the uploaded JVs and BCRs are posted by running the Trial Balance Summary II report. Notify Project Manager/Budget and Grant Manager when closure has been completed. Receive the approved Notice of Project /Grant Completion (NOPGC). Review the correctness and completeness of the required attachments. Submit to the Administrative Managers for Approval. Submit original and e-mail the request for processing to Accounting. Send copies to the preparer of the NOPGC for</p>		
<p>their file. Receive Notice from Accounting of final closure or deficiency/correction on the Project/Grant. Notify the preparer of the action taken by Accounting.</p>		

DUTIES	FREQUENCY	PERCENTAGE
<p>5. Perform the following Audit Process in the Annual Audit of Fund 2213 and assist in the audit of Fund 2211,2213 and 2162</p> <p>1. Run a trial balance report by fund to establish the starting numbers of the audit 2213 fund for Alameda CTC and Fund 2162 for MTC-TDA. Use this report as a reference worksheet to arrive at the final audited numbers.</p>	5 for 2 months	15.00%
<p>Make sure the beginning fund balance reconciles with the ending fund balance of the preceding fiscal year before posting any audit adjustments. (Please see attached Trial Balance)</p> <p>2. Prepare audit schedules/reports to back up the numbers in the trial balance.</p> <p>3. Run payroll detail report to show employees charged to projects or period selected by the auditor. This report is used for payroll sampling.</p> <p>4. Provide documentation to support the transactions selected by the auditor in his/her sampling process</p>		
<p>(cash receipts, payment requests, time cards or JV's)</p> <p>5. Prepare Journal Vouchers to record audit adjustments.</p> <p>6. Post the audit adjustments into the trial balance worksheet.</p> <p>7. Prepare a summary of all Journal Vouchers.</p> <p>8. Summarize the monthly allocation transmittal from Alameda CTC to have the year's total revenue. Reconcile amount with adjusted trial balance.</p> <p>9. Respond and send additional audit requests and further scrutiny by the auditor.</p> <p>10. Enter all audit adjustments in the system, except</p>		
<p>the memo entries, to ensure that the general ledger reconciles with the audited financial report.</p> <p>11. Run Funds Available Report and post audit adjustments to each project affected</p>		

SECTION C - IMPORTANT & ESSENTIAL KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

Knowledge: refers to the concepts and information gained through experience, training and/or education and can be measured through testing.

Skills/Abilities: refers to the proficiency and capability which can be demonstrated and are typically manual in nature and/or can be measured through testing.

What are the knowledge, skills and abilities needed to perform this job?

My education and knowledge of accounting has given me a detail oriented approach in performing audit and fiscal operations and performing variety of accounting tasks. I have a Bachelors Degree in Accounting and a licensed CPA in the Philippines. I got my first job in the City of Oakland Budget Office as temporary Accountant for almost 2 years. Through this exposure and association, I learned and performed a variety of accounting duties that include payroll, budget change requests, journal vouchers, lifting the suspension of invoices on hold payment request and assisted supervisor in the preparation of financial and fiscal matters for the city budget. With these knowledge and experiences, I was hired for permanent position as an Account Clerk III, Accounting Technician and Accountant II, Through several Oracle trainings, I became skilled and proficient in purchasing, payroll, and accounting as the Oracle system is upgraded. I also have advance knowledge in Microsoft work, outlook and Excel.

What additional knowledge and skills could be learned on the job?

Through my attention to details, I gained knowledge of new, on going and old projects approved by city council members as documented in the city council resolution. As an Accountant, knowledge of the funds balance helps me in the analysis of projects/grants with a healthy or negative cash balance. This helps in calling the attention of Project Manager to bill or make drawdown to make the cash balance positive/minimize negative balance. Updating knowledge through continuous education in various Oracle capabilities helped me to facilitate/assist in the preparation of financial reports like processing of clean up, closing of completed projects and for funds and projects for audit. Exporting financial reports like Project Accounting, AP, and other reports helped me to enhance excel spreadsheets and windows skills like sorting, formulas, formatting and others.

SECTION D - WRITTEN PROCEDURES/GUIDELINES/MANUALS/POLICIES

If you have any procedure manuals, guidelines, policies, references, tables, laws, rules, etc. to assist you in performing your duties and responsibilities, please identify and describe such materials and how they are used:

1. Table on the Red Wing Shoe Company with Contract Purchase Number 2013 with column heading: Fund Organization. Program - Use in creating the Standard PO for processing Invoices for the Safety Shoes for various PWA employees. Funds availability check is a tool in the creation of Standard Purchase Order. Skipping the Fund Available Report Inquiry in the General Ledger saves time.
2. Sample of Trial Balance Summary II of a Project on file for my reference - Guide in the process of clean up of on-going projects and completed Projects. It is a reminder for me on how to check /account for the Cash Differences and the difference between Revenues and Expenditures Spreadsheet for the computation of Overhead Burdened Cost to document the Personnel Cost Accounts of employees for clean up, closure of completed projects.

SECTION E - DECISION MAKING/PROBLEM SOLVING

List examples of decisions or commitments you regularly make without prior approval. Who is directly affected and how?

1. Coding block indicated in the approved invoice differs from the related approved Standard PO (SPO). To facilitate the payment request process, I use the coding block in the approved Standard PO. Notify the supervisor/project Manager or the Administrative Assistant. JV should be done to move the charges as indicated in the Stamped Approval Authorization of the Invoice. Review and upload the JV. If no sufficient fund to cover the JV Notify them to prepare BCR. Review and upload BCR.
2. Make necessary corrections in the Journal Vouchers and BCRs if possible. Correct error found in the amount, Project Number Program Code in the BCR or JV. Run the updated Funds available report and compare attached Funds Available Report. Correction is made based on this and the attached Invoice and Oracle Run of the expenditures.

What types of questions or issues would you usually take to your supervisor for advice or resolution? Give specific examples.

1. What to do if my Oracle, Microsoft Outlook and Microsoft Windows are not working properly.
2. How to use tools in Purchasing Module. The Detailed Encumbrances Balances of the Contract PO and Standard PO, the End Date of ESD Contracts were not touched in the Oracle training we attended. These tools are very useful to expedite the process of Contract Payments.
3. Amount of appropriations/budget requested by Project Manager is less than the Approved amount by the City Council Resolution
4. Amount of Change Order exceeded the total contract per City Council Resolution.
5. Coding block to use to move out/in the excess expenditures and excess revenues in the clean up /closure of Grant Projects

Briefly describe two typical problems or difficult/sensitive situations you have been called upon to deal with in performing your duties and how you dealt with/solved each situation.

1. Treasury held payment request for Capital Project-C254430 due to excess in appropriation. Before Treasury found out about this, I already knew it while doing my cleanup of projects. I went back to my spreadsheet to review and submitted corrected spreadsheet on analysis of Funds Availability to my Supervisor. The Budget Analyst required us to prepare the BCR to correct the over appropriation and other transactions in the past years. Attached are e-mails and copy of the BCR for your reference.
2. Revise the fund 2213-Measure B schedule for other revenues reported in the audited financial statements. This is ACTC requirement for the compliance report. Reformat the schedule to show the detailed description of the account. The revised format shows revenues actually received from ACTC-Measure B fund and Non-Measure B. Please see attached report.

SECTION F - SUPERVISION EXERCISED

Do you directly supervise anyone? No Yes
 If yes, please specify number of staff and identify the exact classification titles:

SECTION G - EQUIPMENT AND MACHINE OPERATION/COMPUTER SOFTWARE

In the performance of your duties, are you required to operate any equipment such as computers and software, calculators, forklifts, copiers, fax machines, hand/power tools, etc.? No Yes
 If yes, please list the equipment, machines, tools and/or software programs that you use and the purposes for which you use them.

Equipment, Machine, Software, etc. and Purpose	
1	Computer-Access Oracle, Microsoft Word, Excel and Outlook. Oracle System-use to perform the financial, purchasing, payroll, audit activities as described in Section B of the application.
2	Microsoft Excel-to format exported financial reports from Oracle for the closure, clean up, fund balance report, audit spreadsheet.
3	Microsoft Word-to print copy of Oracle reports that can not be downloaded and attached to the same to the email. Use in emails, letters and correspondences as required in the discharge of duties. To send and reply.
4	Microsoft Outlook-send and reply emails to supervisors, co-workers, vendors and auditors regarding issues/questions on JVs, BCRs, POs, Invoices, payment requests and other important matter.
5	Calculators-use to check the mathematical computations entered in the Payment Request against the total of amount of various invoices being processed.
6	
7	
8	

Does your work require you to drive an automobile or other vehicle? No Yes
 If yes, describe the type of vehicle, the purpose of use, and frequency:

SECTION H - WORKING RELATIONSHIPS/HUMAN INTERACTION

Please list your contacts below. For each type of contact, indicate the purpose of the contact by inserting one of the corresponding numbers provided below on each line.

PURPOSE OF CONTACTS	
1 = Provide information/service	5 = Negotiate within policy
2 = Coordinate services, projects, and/or activities	6 = Negotiate involving policy changes
3 = Solve problems for services, projects, and/or activities	7 = Other (specify below in remarks)
4 = Supervise and direct others	

Type of Contact (List Classification titles)	MAIN PURPOSE
1 Within work section/unit: Administrative Manager II Budget & Grant Administrator Management Assistant Accountant I & III, Account Clerk II & III	Select One 1
2 Within Department: Agency Administration Manager, Payroll Clerk III IT Project Manager and Staff	Select One 1
3 Within City: Project Managers, Administrative Assistant II, Administrative Analyst II, Budget Analyst, Budget Analyst, Budget Controller, City Administration Analyst.	Select One 2
4 Vendors or outside agencies: External Auditor	Select One 1
5 Other Federal, State, local or non-profit agencies:	Select One
6 Committees, Boards & Commissions:	Select One 1
7 General public:	Select One 1
8 Other (specify):	Select One

SECTION I - PHYSICAL ACTIVITIES/REQUIREMENTS

This section helps us understand the physical activities and requirements that are absolutely necessary for you to successfully perform your job.

Does your work require any physical exertion such as bending, lifting, carrying, climbing or work in tight spaces, etc? No Yes

If yes, describe the circumstances of such activities and indicate corresponding amounts of weight, if applicable.

SECTION J - QUALIFICATIONS

EDUCATION						
Name, City and State of High School, Colleges/Universities	Units Completed		Course of Study/Major	Type of Degree?	Completed?	
	Semester	Quarter			Y	N
Torres High School, Manila	8			High School	<input checked="" type="checkbox"/>	<input type="checkbox"/>
University of the East.	8		Business Administration Accounting	College	<input checked="" type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
Other relevant courses and training	Name & Location of Institute		Length of course	Date Completed		
Oracle Training-Web ADI, Prompt Payment, Procure to Pay	150 FHOP FHOP		18 hrs.	Various Dates		
Advance Excel Training Excel Level II	Alameda County Building AIM Solutions, San Francisco		12 hrs. 7 hrs.	Nov. 8 to 9 2012		
Professional licenses or certificates	Certificate Number		Date Issued	Expiration Date		
Certified Public Accountant - Philippines			Inactive			

SECTION K - COMMENTS

Is there an existing City classification which you believe captures the work that you perform?
 No Yes
 If yes, provide exact classification title:
 Accountant III

I certify to the best of my knowledge that the information contained in this questionnaire is an accurate description of my current duties and responsibilities as required by the position I hold.

Eliisa P. Galang
 Signature of Employee

3/12/13
 Date

DHRM USE ONLY	
<input type="checkbox"/> Complete PDQ = assign to staff	
<input type="checkbox"/> Incomplete PDQ = return to department	
Analyst: _____	Date: _____
Comments/notes:	



DEPARTMENT OF HUMAN RESOURCES MANAGEMENT
RECRUITMENT & CLASSIFICATION DIVISION



POSITION DESCRIPTION QUESTIONNAIRE
PART II: SUPERVISOR'S REVIEW PORTION

The purpose of the Position Description Questionnaire (PDQ) form is to obtain information about the employee's current position including the duties that are performed, the level of authority exercised and responsibility, and the skills and abilities needed.

DIRECTIONS:

1. Review your employee's responses and add any notes/remarks below when there are omissions or areas in which you believe further explanation is necessary.
2. A hard copy of this document should be submitted to the Classification Supervisor within two weeks of receiving Part I from the incumbent.
3. Once you have reviewed and signed, please retain a copy for departmental records and submit the entire packet (Classification/Compensation Request form and PDQ Parts I & II) to: Department of Human Resources Management, ATTN: Classification Supervisor, 150 Frank H. Ogawa, 2nd Floor.
4. If you have any questions, please email class.comp@oaklandnet.com.

DEPT OF HUMAN RESOURCES
 MANAGEMENT
 13 APR 24 PM 4:00

SECTION A - SUPERVISOR INFORMATION

Supervisor's Name:	LUCIUS HATCHER JR
Exact Classification Title:	MANAGEMENT ASSISTANT
Phone Number & Email:	238-7928 lhatcher@OAKLANDNET.COM
Work Location:	PWA-FISCAL 250 FHP 3RD FLR SUITE 3341

SECTION B - CLASSIFICATION FACTORS

In responding to the factors listed below, read and utilize the current classification specification (job description) as well as any other documented agreements regarding duties and responsibilities between you and the employee. Remember to address only duties that are a regular and continuing part of the employee's job.

CLASSIFICATION FACTOR	YES	NO
1. The complexity of the work has changed and now involves a higher level of knowledge/skills that are utilized on a regular and continuing basis.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. The scope of responsibility has changed. (i.e., previously non-supervisory and now supervises staff including the completion of performance appraisals and approval of absences and leaves, etc.)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. One or more new functional areas of responsibility have been added (e.g., the position is responsible for providing clerical and administrative support but has additionally been assigned development of programs).	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. New requirements for education and training or certification may be necessary.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5. The position has a broader scope of supervisory duties involving diverse subordinate classifications.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. The duties that are now being performed differ significantly (50% or more) from the duties necessary when the employee was hired for the position.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Assigned to THH
4/26/13 ftd

SECTION C - COMMENTS

The incumbent's responses to the questionnaire adequately describe the duties, authority and responsibility of the work currently performed. No Yes

The incumbent's responses to the questionnaire overstate / understate the duties, authority and responsibility of the work currently performed. *NA*

Comments:

INCUMBENT HAS TAKEN ON A LEAD POSITION FOR OUR AGENCY'S AUDIT FUNCTIONS AND PROJECT CLOSURE PROGRAM.

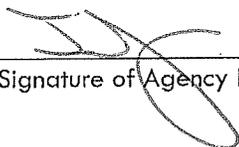
I have reviewed the incumbent's responses to Part I of the Position Description Questionnaire (PDQ) Form. I understand that the documents are time sensitive and need to be submitted to DHRM's Classification Supervisor within two weeks of receiving Part I from the incumbent.



Signature of Supervisor

3/13/13

Date



Signature of Agency Head/Director

4/22/13

Date



150 Frank H Ogawa Plaza 2nd Floor
Oakland, CA 94612
(510) 238-3112

HUMAN RESOURCES MANAGEMENT
Recruitment and Classification

March 31, 2014

CERTIFIED MAIL #7004 1350 0000 4639 1203

Elvira Galang

Re: Classification study – Accountant II

Dear Ms. Galang:

The Human Resources Management Department has completed a review of your current position, Accountant II. The findings recommend that your position remain as allocated. The outcome of the audit was based on: your Position Description Questionnaire Form; meetings with you, your supervisor, and other subject matter experts; and a comparison of the duties and responsibilities of your position to other City of Oakland classifications. The final findings are included with the enclosed Position Audit Report.

These findings serve as notification that your position is at the appropriate level and is performing work within the scope of your current classification. Additionally, the subset of grants accounting duties should be reallocated to the Accountant III position in your unit.

If you would like to appeal this decision, you may do so pursuant to Section 3.04 (e) of the Civil Service Rules. Appeals must be sent to the Secretary to the Board, Anil Comelo, within fifteen (15) business days of this notification. Therefore, any correspondence from you must be received in our office by the close of business, 5:00 p.m., on Monday, April 21, 2014.

If you have any questions or comments, please call me at (510) 238-3425.

Sincerely,

Eric Williams
Human Resource Analyst

cc: Santos Quintero, Local 1021
Yolanda Lopez, Dept SPOC
Kip Walsh, HR Manager
Jaime Pritchett, Principal HR Analyst
HR History File

RECEIVED
MAY 1 2014
CITY OF OAKLAND
HUMAN RESOURCES
DEPARTMENT



HUMAN RESOURCES MANAGEMENT
RECRUITMENT & CLASSIFICATION DIVISION

POSITION AUDIT REPORT

Incumbent:	Elvira Galang
Department & Division/Unit:	Public Works/Administration/Financial Services
Current Classification:	Accountant II
Requested Classification:	Accountant III
Recommendation:	Accountant II
Analyst Assigned:	Eric Williams

BACKGROUND:

The incumbent, Elvira Galang, submitted a Position Description Questionnaire (PDQ) on March 13, 2013 and requested that her position be reclassified from Accountant II to Accountant III. The incumbent holds one of many Accountant I/II/III positions within her particular unit of the Public Works Department. The incumbent has been with the City since 2001 and has served within different capacities. She has been in her current AII role since 2004. After reviewing the AII classification specification, the incumbent requested a reclassification because she believes that the duties of the Accountant III are equivalent to the work she currently performs and that she would like to be placed in the higher classification.

RESEARCH:

Ms. Galang is an AII in the Financial Services Unit within the Administration Bureau of the Public Works Department. She is tasked with various financial projects which primarily involve the auditing of grant projects and preparation of financial statements for project closure.

The incumbent's duties are grouped in two primary areas as described below:

Duty Set A - 85%

Prepare Financial Statements: Revenue and expenses and fund balance reports for projects/grants cleanup, closure and audit. 77.5%

- 1) Run the Trial Balance Summary Report II of the Grants/Project to date using the Oracle OAK GL City Wide. Print the report. Export Report in browser. Save as text file. Format the Report in excel. Present the financial data in a balance sheet and statement of revenue and expenditures format. Total all assets and liabilities. Calculate the difference between the two. The result is the Net Assets which must equal to the reported net worth.
- 2) Categorize expenditures as personnel cost and operating and maintenance. Get the sub-totals and add the two together to get the total expenditures. Total asset minus total liabilities is equal to net operating expenses. This must be equal to the net worth/fund balance before adjustment if any. Prepare necessary Adjustments to arrive at adjusted fund balance.
- 3) Run Detail Summary Report II to clean the cash account balance. Format the coding block in Excel. Prepare the JV (journal voucher) by reversing the entry cash account balance. Submit JV for approval. Upload and get the ID number and note in the hard copy. Make a copy. Submit hard copy to Accounting. Run Detailed Trial Balance Summary II after the JV is posted.
- 4) Run the OAK detailed report on project Grants for cleanup, closure and audit.

Journal Vouchers (JV) and Budget Change Request (BCR): Review JVs from other departments for BCRs and funding for JVs. 7%

Duty Set B - 15%

Grant Audit: Perform Audit Process in the Annual Audit for Funds 2211, 2212, 2213, 2215 and 2162. Audit period runs from October to Mid-December with a Compliance Review in February. 15%

- 1) Run a Trial Balance Report by fund to establish the starting numbers of the audit 2213 fund for Alameda CTC and Funds 2162 for MTC-TDA. Use this report as a reference worksheet to arrive at the final audited numbers. Make sure the beginning fund balance reconciles with the ending fund balance of the preceding fiscal year before posting any audit adjustments.
- 2) Prepare audit schedules/reports to back up the numbers in the trial balance.
- 3) Run payroll detail report to show employees charged to projects or period selected by the auditor. This report is used for payroll sampling.
- 4) Provide documentation to support the transactions selected by the auditor in sampling process (cash receipts, payment requests, time cards or JV's)
- 5) Prepare Journal Vouchers to record audit adjustments
- 6) Post the audit adjustments into the trial balance worksheet.
- 7) Prepare a summary of all journal vouchers
- 8) Summarize the monthly allocation transmittal from Alameda CTC to have the year's total revenue. Reconcile amount of adjust trial balance.
- 9) Respond and send additional audit requests that are subject to further scrutiny by the auditor.
- 10) Enter all audit adjustments in the system, except the memo entries, to ensure the General Ledger reconciles with the audited financial report.
- 11) Run funds available report and post audit adjustments to each project affected.

Since the completion of the PDQ by the incumbent, the arrangement of duties has changed. Duty Sets A and B listed above reflect the current responsibilities. The table below depicts what duties were listed upon submission of the PDQ, changes in overall percentage of work since that time, and where duties were assigned that are no longer performed by the incumbent.

	Duties	PDQ Duties as of 4/22/2013 Date of Submission	Current Duties as of 3/13/2014	Duties Reassigned Where?
I	Prepare financial statements, revenue and expenses and fund balance reports	48.5%	77.5%	
II	Annual Audit of Grant Funds	15%	15%	
III	Review Journal Vouchers from other department Budget Change Requests	0%	7%	
IV	Prepare invoices on hold report of insufficient funds	0%	0.05%	
V	Process/monitor payment requests	36%	0%	Account Clerk III
VI	Create PO for new, extension of term and existing contract and professional agreement	0.05%	0%	Account Clerk III
	Total Allocation	100%	100%	

Knowledge/Skills/Abilities:

Knowledge of:

- Principles and practices of general, fund, and governmental accounting.
- Investment, commercial law, and legal terminology.
- Applicable federal, state, and local legislation.
- Data collection and analysis methodologies; program, grants, and budget management.
- Policies and procedures related to the department or functional area to which assigned.
- Computerized accounting systems and applications; budget principles and terminology.
- Principles and practices of lead supervision.

Ability to:

- Plan, assign, direct and review the work of others.
- Analyze, post, balance, and reconcile accounting records and financial statements.
- Interpret federal and state regulations pertaining to municipal governments.
- Verify the accuracy of financial data and information.
- Make sound independent judgments within established guidelines.
- Ensure proper authorization and documentation for disbursements and other transactions.
- Communicate effectively in both oral and written form.
- Maintain accurate records; prepare clear, concise reports.
- Establish and maintain effective work relationships with those contacted in the performance of required duties.

Education/Training/Experience:

Education: Bachelor's degree from an accredited college or university in accounting, business administration, or a related field required. Directly related work experience may be substituted for the educational requirement on a year-for-year basis, provided the applicant has completed college level accounting course work beyond the intermediate level.

Experience: Two years of accounting experience. Governmental accounting experience desired.

Written Procedures, Guidelines, Manuals and Laws Governed By:

The incumbent refers to numerous spreadsheets that she created in order to inform and guide the work process. The incumbent also stated that she refers to City Council Resolutions and City Budget documents.

Supervisory Controls:

This position receives general oversight and direction from two sources which represent the distinction between Duty Sets A and B.

Duty Set A: reports to the Fiscal Services Manager for general instruction, assignment and feedback.

Duty Set B: receives assignments from the Budget & Grants Administrator and provides additional assistance to projects as needed when the Budget & Grants Administrator is out of the office.

In both cases, the incumbent operates independently and autonomously, gathering feedback only when problems arise or higher level input is required.

This position provides input and feedback to other positions such as Accountant I positions and Account Clerk positions. The incumbent may solicit the assistance of Accountant I and Account Clerk level staff for completion of more complex projects, as needed. However, no information was revealed that suggests the incumbent provides supervisory level input in the form of discipline, regular work assignments, hiring decisions or performance reviews.

Equipment Used Regularly:

The position utilizes a telephone, photocopy machine, personal computer, monitor, keyboard, mouse, printer, various databases (Oracle) and Microsoft Office applications (Word, Excel, Outlook, etc.).

Work Environment:

The position is located in an office setting with the incumbent sitting at a desk in a cubicle.

Contacts:

- In Work Unit – Account Clerk III, Accountant I/II/III and Administrative Services Manager II
- Within the City – Indirect interaction with Project Managers (submits questions and comments to Budget & Grants Administrator), Direct interaction with Project Managers (basic information gathering and/or dissemination) and the Budget Department
- Vendors or outside agencies – External Auditor

The incumbent works primarily in a capacity that is processing, analyzing, digesting and providing feedback on data. The incumbent works autonomously under the general supervision of the Administrative Services Manager II and Budget & Grants Administrator to meet work objectives.

Duties Performed That Are Not On Current Job Spec: The classification specification is very general as it is a Citywide position where incumbents may be performing a number of specialized tasks as per the demands of their particular department. As a result, the Department Managers were consulted as to what constitutes an operational distinction between Accountant II and Accountant III duties within their particular unit. The primary distinctions were: complexity and supervision of staff. The class specifications reflect these distinctions with use of the following language:

Complexity

Accountant II: Performs moderate to difficult accounting and auditing tasks under limited supervision.

Accountant III: Solve complex accounting and auditing problems.

Supervisory

Accountant II: May provide lead direction to Accountant I and accounting clerical staff.

Accountant III: Train and direct assigned staff. May provide lead direction or supervision to accountants and account clerical staff.

Alignment Factors:

Internal: The following City of Oakland classifications were reviewed: Accountant II and Accountant III.

External: N/A

ANALYSIS & JUSTIFICATION:

Background of position: In order to fully understand the current function and orientation of this position, background information is required. This position was filled in 2004 with the current incumbent, and she carried out Accountant II level work on a regular basis. In 2005, the incumbent began assisting with Grant Audit work. The subset of more complex grant auditing duties had been previously performed by the Accountant III in the unit; per the current and former Administrative Services Manager II and Budget & Grants Administrator, the work captured in Duty Set B is consistent with Accountant III responsibilities. This continued until the Fiscal Year 2011-2012.

Up until this point, it is reasonable to assume that an Accountant II providing input, assistance and taking on portions of assignments from that of an Accountant III is well within the confines of ordinary Accountant II responsibilities. When the Accountant III incumbent retired, the AII incumbent received complete ownership of a Grant Fund from the Accountant III workload. The remaining work was presumably assigned elsewhere, with much of it being assigned to the Management Assistant. The recently retired Accountant III also returned as a Temporary Contract Services Employee (TCSE) to assist with the busy season. Upon the subsequent relocation of the Management Assistant to another work unit, the Accountant II incumbent inherited additional grant fund responsibilities. The following is a general outline of the incumbent's description of her acquisition of duties:

- FY 04/05: Work in general Accountant II capacity
- FY 05/06 - 10/11: Providing assistance to Grant Audits (2211, 2212, 2213, 2215, 2162)
- FY 11/12: Ownership of one Grant Fund (2213), Assist with others
- FY 12/13: Ownership of five Grant Funds (2211, 2212, 2215, 2215, 2162)

The Budget & Grants Administrator has verified that the Accountant II incumbent has ownership over a number of Grant Fund Audits.

The following details are relevant to the study of this position:

- The Accountant II clarified having not inherited any additional duties from the Accountant III or Management Assistant upon either leaving their roles in Fiscal services beyond the grants auditing work.
- Between the period of the Accountant III retiring and present day, a variety of changes have taken place. First, the Accountant III position was eliminated. Then a Management Assistant carried out those functions. Once the Management Assistant vacated that role, the position was converted to an Accountant III. The newly created Accountant III position was vacant until recently when a new Accountant III was hired; that incumbent is presently in the Accountant III position.
- The Accountant II has received acting pay in the past for coverage of AIII duties.
- The current Accountant III is now training, learning and becoming familiar with the various responsibilities of the work unit. However, the evidence suggests that the incumbent has not yet taken on the full spectrum of Accountant III level duties, including those formerly assigned to an Accountant III position

Analysis:

The Position Description Questionnaire was received on March 13, 2013. The incumbent interview occurred on February 28, 2014. Supervisor interviews were held on February 28th, March 4th and March 14th. Between the date of submission and the date of the incumbent interview, the incumbent's duties changed. As noted in the chart of duties on Page 2, the

percentage of time spent preparing financial statements, revenue and expenses and fund balance reports increased dramatically and the percentage of time spent processing/monitoring payment requests dropped dramatically. The processing/monitoring of payment requests was reassigned to the Account Clerk III staff as a result of shifting roles and responsibilities in the Unit.

The Administrative Services Manager II and the Budget & Grants Administrator were consulted as to what constitutes an operational distinction between Accountant II and Accountant III duties within their particular units. Supervision and complexity were cited.

Supervision: No evidence was gathered that suggested the incumbent supervises trains and/or evaluates assigned staff – as listed within the Accountant III classification specification. Further, within the Accountant II specification the following are listed: provide lead direction, training and work review to a small accounting staff as assigned; organize, assign and review work; provide input into selection decisions, performance evaluations and disciplinary matters. There is evidence that the incumbent provides work direction, but none so far as to indicate that this is being performed at a true supervisory level. Absence of this duty set does not, on its face, constitute exclusion as an Accountant III – only that there lacks evidence to make the case from this perspective.

Complexity of Projects: The responsibilities undertaken within Duty Set A reflect a majority of the incumbent's work. There is ample evidence that the projects to which the incumbent is assigned are completed autonomously and to the satisfaction of the managers to whom they report; this constitutes the majority of the daily responsibilities. In the case of the duties listed in Duty Set A, the overwhelming majority of the work is reasonably attributed as being at the Accountant II level. The incumbent has stated that this is her primary work assignment and has been since starting the position. When asked where the work would be assigned in the absence of the incumbent, the managers generally agreed that it would be distributed among Accountant-level staff depending on the nature of the assignment. Further, the work assigned is not sufficiently critical or complex in nature that it required reassignment to an AIII to be completed successfully.

Despite overall approval from the managers of the position and assertion that the incumbent acts autonomously and effectively in these duties (Duty Set A), it is an indication of a well performing employee that thoroughly understands the job, not necessarily that of one performing duties that are out-of-class.

In regards to Duty Set B, there is ample evidence that the work performed in the process of auditing grants is that of an Accountant III. Historically, this work has been assigned to an Accountant III. The work is traditionally performed in a manner that requires contact, organization and delegation to support level staff (Accountant I/II and Account Clerks). After the incumbent that had been performing this work retired, it was assigned to a Management Assistant and then finally to the Accountant II after the Management Assistant relocated within the Public Works Department. As the incumbent had already been providing long term assistance to the overall completion of these duties, she has been able to successfully complete all grant audit functions, including those determined to be that of a typical Accountant III level. The Budget and Grants Administrator has verified that they have been performed to satisfaction since assigned. As a result, the incumbent has taken the lead on several funds that are complex in nature, comprised of tasks and abilities that are indicative of Accountant III level work. This currently constitutes 15% of the incumbent's daily workload from the months of October to December and concludes with a final compliance meeting in February of each fiscal year. The evidence is suggestive that the incumbent is performing a subset of duties (when undertaking the responsibilities as outlined in Duty Set B) that is more commensurate with duties that are typically assigned at the Accountant III level. However, the subset comprises 15% of the

incumbent's assigned duties and only for a portion of the year; it does not reflect the preponderance of incumbent responsibilities and is not representative of an incumbent working sufficiently out of class.

Given the history of the position, it is immediately apparent that a fully performing Accountant II has gradually assumed a portion of the duties previously assigned to an Accountant III. Due to the absence of the Accountant III to complete these duties, this has become a predictable part of the Accountant II incumbent's regular routine for a portion of the year. As a result, it is clear the incumbent is performing some out-of-class duties. However, the evidence is highly suggestive that this is a consequence of staffing levels; the vacant Accountant III position was recently filled. Additionally, the subset of duties estimated to account for 15% of the incumbent's overall duties is not substantive enough to merit a reclassification to a different classification.

The position held by Elvira Galang is primarily responsible for providing specific accounting services, separated into two distinct domains, for the Financial Services Unit within the Administration Bureau of the Public Works Department. Based on all the information collected for this study, it has been determined that a portion of the work assigned does in fact meet the criteria for an Accountant III position but is not significant enough to warrant a reclassification. The Human Resources Management Department therefore recommends that the position remain as allocated - Accountant II, with duties meeting Accountant III criteria (Duty Set B) reassigned as appropriate.

FINAL RECOMMENDATION:

The position held by Elvira Galang is primarily responsible for the cleanup, balancing and auditing of completed projects in addition to the audit of Grant Funds. She provides accounting expertise by completing trial balances, reconciling previous year's reserves and closing project accounts. These findings serve as notification that the incumbent, Elvira Galang, is performing a majority of the work that falls within the Accountant II classification while a portion of her duties (approximately 15%) aligns with the Accountant III classification. Based on the information collected for this study, the position's duties and responsibilities are consistent with the current Accountant II classification specification; however the subset of duties outside of the Accountant II classification should be reassigned as appropriate. The Human Resources Management Department therefore recommends that the position remain as allocated.

RE-CLASSIFY TO:

- New Position
- Current Position – Accountant II

IMPLEMENTATION METHODOLOGY:

The Human Resources Management Department recommends that the Accountant II position held by Ms. Elvira Galang, remain as allocated. However, duties that were determined to be out-of-class (Duty Set B) should be reassigned to Accountant III staff.

ANALYST:

Eric Williams
Eric Williams, Human Resource Analyst

Date 3/31/14

APPROVAL FOR FORWARDING:

Jaime Pritchett
Jaime Pritchett, Principal HR Analyst/Classification Supervisor
Recruitment & Classification

3/31/14
Date

Elvira P. Galang

April 21, 2014

Mr. Anil Comelo
Secretary to the Board of Appeals
150 Frank Ogawa Plaza
Oakland, CA 94612

Dear Mr. Comelo,

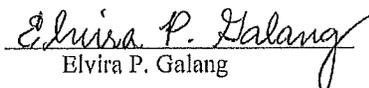
I would like to appeal the decision on my classification study for the position of Accountant III in Office of Public Works, Bureau of Administration, Fiscal Services Division. I believe I have presented my duties into two major categories with percentages of 85% and 15%. The two categories involve the same processes and degree of complexity. Duty set A as categorized by Eric Williams are for Grant Projects with by various funds and most of them are audited when the Projects are completed. Duty set B is for matching Funds - Measure B and Transportation Development Act fund where the Audit are on a yearly basis.

I strongly believe I am qualified and eligible to be upgraded to Accountant III position for I have been an Accountant II for more than ten years and have gained knowledge, skills, and abilities (KSA) about the grants and project accounting. I am now doing the same duties and responsibilities as the retired Accountant III. Since the Accountant III retired about four years ago, I am doing the work she used to do in addition to work assigned to me like processing Contract Payments and Safety Shoes Payment Requests, preparing Budget Change Requests (BCRs) and Journal Vouchers (JV), reviewing BCRs and JVs of other Department before uploading them. In February of 2013, I informed Management that I was overwhelmed and overworked with my workload. Management relieved of the rest of the aforementioned duties and assigned only the clean up of Grants and Projects for audit and for closure. The clean up for grants and projects are not always updated and completed. Completion of grant projects may take two to three years and sometimes extended for another year. I dedicated my KSAs as an accountant.

Attached is my justification for my appeal.

I hope for your favorable consideration to my appeal.

Respectfully yours,


Elvira P. Galang

cc: Santos Quintero, Local 1021
Yolanda Lopes, Dept. SPOC
Kip Walsh, HR Manager
Jaime Pritchett, Principal HR Analyst
Eric Williams, Human Resource Analyst

Justification

Duty Set A- Prepare Financial Statements: Revenues and expenses and fund balance reports for project/grants clean up, closure and audit. 77.5%

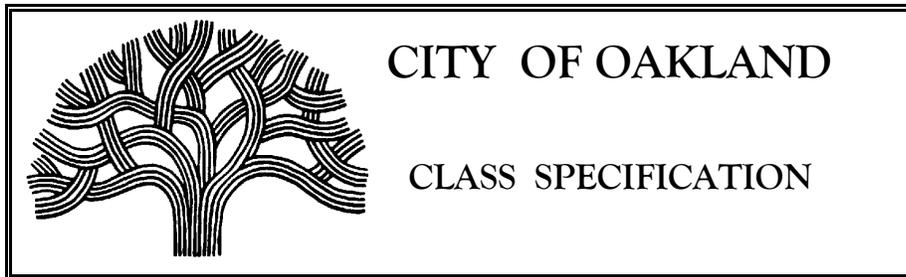
The duties as stated in my Position Description Questionnaire are the same as what the retired Accountant III did. This triggered my request for the classification study. The Duty Set A and Duty Set B per Position Audit Report have the same work processes, requirements, logistics, and degree of complexity.

Duty Set A are for main Projects with Fund 2165 Proposition 1B, 2999 Miscellaneous grants, 2116, Federal Department of Transportation, 2140 State Department of Transportation, 2606 American Recovery and Reinvestment Act, and 2610 State Water Control Board and many other Public Works grant funds which the Human Resource Analyst rated 77.5% while Duty Set B are for the Matching Funds 2211 Measure B Local Streets and Roads, 2212 Measure B Bicycle and Pedestrian, 2213 Measure B Paratransit Program, 2215 Vehicle Registration Fund and Fund 2162 Transportation Development Act Fund which he rated 15%.

I separated these duties because I can account for the workload for these Matching Funds that are regularly audited during October. There was a misunderstanding by the human resource analyst. There are projects with two funding sources. The work responsibilities are so complex and tedious that the work involves a lot of analysis of transactions for the main/master projects and matching Funds for the sub-Projects that occurred in the previous one to 3 years and thus involve auditing knowledge, skills and abilities.

Clean up for audits are done only when the Audit date is forthcoming while clean up for project closure are backlogs when I started in 2004. To date, there are several old projects and new projects that have to be cleaned - reconciled or balanced in terms of its revenues and expenditures. These aside for the current active Projects that are on-going, that need to be cleaned up for the Budget for the expenditures portion for the preliminary construction/design are already exhausted and a new BCR has to be done for the Construction phase.

My work as Accountant II is different from other Accountant II. I am doing accounting and reconciliation of the Grants / Projects that have been billed and revenues received. I have to trace one to three years back the transactions and analyze them. As an Accountant II I am aware that I do not have the supervisory functions so it just fine that I do not have people to supervise. It will be unfair and not within my job specifications if I perform supervisory duties of an Accountant III. I can perform the supervisory function over any account clerk or accountant in case my request is approved.



Class Code: AF021

Rep. Unit: SD1

CSB Status: CC

ACCOUNTANT II

DEFINITION

To perform moderate to difficult accounting and auditing tasks, including the design and preparation of accounting, statistical, and narrative reports; to analyze, examine, interpret, and reconcile City accounting records; and to monitor financial records, grants, and contracts.

DISTINGUISHING CHARACTERISTICS

This is a journey level classification in the professional accounting series. Incumbents perform moderate to difficult accounting duties under limited supervision and may provide lead direction to assigned staff. This classification differs from Accountant III in that the latter may supervise or direct accountants and performs complex accounting duties.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from an Accounting Supervisor, Accountant III, division manager, or other management staff. May provide lead direction to Accountant I and accounting clerical staff.

EXAMPLES OF DUTIES - Duties may include, but are not limited to, the following:

Perform financial reporting, accounting, and auditing for a City department, division, section, or redevelopment agency.

Review accounting documents to ensure accuracy of information and calculations; make correcting entries; examine supporting documents to establish proper authorization and conformance with agreements, contracts, and state and federal regulations.

Prepare and maintain control and subsidiary accounting records involving a variety of transactions and accounts; prepare trial balances and financial reports.

Prepare journal entries and periodic reconciliations of general ledger, journal, subsidiary accounts, and bank statements.

Reconcile yearly receipts, expenditures, appropriations, and encumbrances of the appropriation system and related accounts in the general ledger; prepare transfers between funds.

ACCOUNTANT II
PAGE 2

Examine and interpret City accounting records for compliance with federal and state grants; prepare mandated annual grants reports.

Establish and maintain financial records for special assessments; issue trust account numbers; reconcile and maintain trust account records.

Provide lead direction, training and work review to a small accounting staff as assigned; organize, assign and review work; provide input into selection decisions, performance evaluations and disciplinary matters.

Maintain and update asset records; calculate and record amortization; of expenditures; delete fixed assets from appropriate accounts; calculate depreciaton expense.

Prepare audit schedules for auditors; implement audit findings and report recommendations.

Reconcile investment activity, take daily bids, and monitor cash flow.

Prepare accounting spreadsheet using computer applications; instruct others in their use.

Review current accounting practices and procedures; recommend modifications and revisions.

May write statistical and narrative reports for City officials, external auditors and various agencies.

Perform related duties as assigned.

QUALIFICATIONS

Knowledge of:

Principles and practices of general, fund, and governmental accounting.

Investment, commercial law, and legal terminology.

Applicable federal, state, and local legislation.

Data collection and analysis methodologies; program, grants, and budget management.

Policies and procedures related to the department or functional area to which assigned.

Computerized accounting systems and applications; budget principles and terminology.

ACCOUNTANT II
PAGE 3

Principles and practices of lead supervision.

Ability to:

Plan, assign, direct and review the work of others.

Analyze, post, balance, and reconcile accounting records and financial statements.

Interpret federal and state regulations pertaining to municipal governments.

Verify the accuracy of financial data and information.

Make sound independent judgements within established guidelines.

Ensure proper authorization and documentation for disbursements and other transactions.

Communicate effectively in both oral and written form.

Maintain accurate records; prepare clear, concise reports.

Establish and maintain effective work relationships with those contacted in the performance of required duties.

EXPERIENCE AND EDUCATION

Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Two years of accounting experience. Governmental accounting experience desired.

Education:

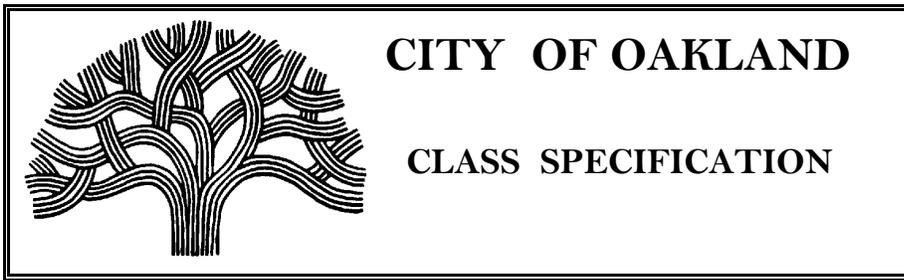
Bachelor's degree from an accredited college or university in accounting, business administration, or a related fields required. Directly related work experience may be substituted for the educational requirement on a year for year basis, provided the applicant has completed college level accounting course work beyond the intermediate level.

LICENSE OR CERTIFICATE

None required

ACCOUNTANT II
PAGE 4

Civil Service Board: # 44346
Date Approved: 10/27/95
Date Revised:



Class Code: AF031

Rep. Unit: UH1

CSB Status: CC

ACCOUNTANT III

DEFINITION

To solve complex accounting and auditing problems; to design and maintain accounting systems; to prepare financial statements and reports; to provide liaison with other departments; and to train and direct assigned staff.

DISTINGUISHING CHARACTERISTICS

This is an advanced journey level classification. Incumbents may provide lead direction or supervision to accountants and account clerical staff. Incumbents perform complex accounting and auditing functions. This classification differs from Accounting Supervisor, which is a supervisory level.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from an Accounting Supervisor, Investment Supervisor, department director, or division manager.

May provide lead direction or supervision over Accountants I or II, and account clerical staff.

EXAMPLES OF DUTIES - Duties may include, but are not limited to, the following:

Perform complex financial reporting, accounting, and auditing for a City department, division, section, or redevelopment agency.

Devise and maintain accounting systems; establish or revise procedures to conform with federal or state laws and generally-accepted accounting principles.

Administer and maintain accounting and bond records; analyze and reconcile revenue accounts, asset and liability accounts, expenditures, appropriations, encumbrances, and bank accounts.

Prepare financial statements, revenue reports, statistical reports, and management reports.

Prepare special financial reports as mandated by federal, state, and City laws, regulations, or ordinances.

Provide technical support to departments; interpret accounting policies and procedures.

Review and update forms and procedure manuals as needed.

ACCOUNTANT III
PAGE 2

Provide liaison between other departments, external auditors, agencies, and the public.

Assist in the preparation and administration of the division, section, or agency budget.

Supervise, train, and evaluate assigned staff.

Perform related duties as assigned.

QUALIFICATIONS

Knowledge of:

Principles, and practices of general, fund, and governmental accounting.

Accounting and budgetary procedures of municipal governments.

Investments, commercial law, and legal terminology.

Computerized accounting systems and applications.

Budget preparation and control.

Principles of supervision and development.

Ability to:

Devise and install accounting systems and procedures.

Solve complex accounting and auditing problems.

Interpret federal and state regulations pertaining to municipal governments.

Work independently and set priorities.

Communicate effectively in both oral and written form.

Develop and maintain cooperative relationships with co-workers in other departments.

Maintain accurate records; prepare clear, concise reports.

Supervise, train and evaluate assigned staff.

Establish and maintain effective work relationships with those contacted in the performance of required duties.

EXPERIENCE AND EDUCATION

Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Three years of professional accounting experience. Governmental accounting experience desired.

Education:

Bachelor's degree from an accredited college or university in accounting, business administration, or a related field.

LICENSE OR CERTIFICATE

None required