

Sonoma County Human Resources Department
Meeting Location: PRMD Hearing Room
2550 Ventura Ave.
Santa Rosa, CA 95403

CIVIL SERVICE COMMISSION
Thursday, November 17, 2016 – 3:00 p.m.

Before addressing the Civil Service Commission,
please state your name and whom you represent.

Disabled Accommodation: If you have a disability which requires an accommodation, an alternative format, or requires another person to assist you while attending this meeting, please contact Adriana Call at (707) 565-6195, as soon as possible to ensure arrangements for accommodation.

Materials related to an item on this Agenda submitted to the Commission after distribution of the agenda packet are available for public inspection in the Human Resources office at the above address during normal business hours.

- I. Call to Order
- II. Approval of Minutes of October 20, 2016
- III. Director's Report
- IV. Public Comment
- V. Reports
- VI. Agenda Items
 - A. Review Civil Service Rule 8.4 – golbou ghassemieh/Christina Cramer.
 - B. Reclassification of Eligibility Worker Positions to Eligibility Specialist Positions - golbou ghassemieh.
 - C. Update on Outstanding Classification Studies - Maggie Miller.
- VII. Other Scheduling Matters
- VIII. Commissioners Open Session
- IX. Appeals
- X. Commissioners Closed Session

CIVIL SERVICE COMMISSION AGENDA

November 17, 2016

- XI. Reconvene from Closed Session**
- XII. Adjourn**

The next Civil Service Commission meeting will be Thursday, December 1, 2016 at 3:00 p.m., in the Sonoma County Board of Supervisors Chambers. The Agenda deadline for this meeting is 2:00 p.m., Thursday, November 17, 2016.



Date: November 17, 2016

To: Civil Service Commission

From: golbou ghassemieh, HR Assistant Director

CC: Christina Cramer, Karen Fies, Kiergan Pegg, Karen Price, Ashley Nolan, Carolyn Lopez, Tony Walls, Julie Kenworthy

Re: Reclassification of Eligibility Worker Positions to Eligibility Specialist Positions

Human Resources is requesting that the Civil Service Commission approve reclassifying 14 newly filled Eligibility Worker positions to the classification of Eligibility Specialist; and to retain and reclassify the incumbents pursuant to a reclassification study approved by the Commission on April 21, 2016, and pursuant to Civil Service Rule (CSR) 3.3b. A presentation will be given during the November 17, 2016, Civil Service meeting detailing the circumstances and applicable Civil Service Rules and interpretations.

A brief summary is as follows:

Human Services Department's (HSD) budget for Eligibility positions hinges on providing the State with quarterly time study reports based on work conducted by filled positions. Securing funding for the maximum number of positions for the following fiscal year depends on HSD having the largest number of filled positions possible during time study periods. Therefore, the Department develops an annual plan for Eligibility recruitments and training classes and works with Human Resources to coordinate recruitments based on this plan and the necessary data collection periods. Based on the pre-planned dates, HR received a request to conduct a recruitment for entry level Eligibility Workers (EW) in the Economic Assistance (EA) and Employment and Training (E&T) divisions on July 6, 2016 in order to have employees hired for the next planned Eligibility training class beginning October 25, 2016; a recruitment was opened on July 13, 2016. At this point in time, HSD reported having 23 vacant EW positions, 19 of which were in the EA division and 4 in the E&T Division.

The Civil Service Commission approved the new Eligibility Specialist (ES) classification series at the April 21, 2016, meeting; however, the County and Service Employees International Union local 1021 (SEIU) were in the meet and confer process over the salaries for the new classifications that had begun in April, and when the recruitment began in July it was unknown when the meet and confer process would be complete.

Because it was evident that HSD was in a very challenging position operationally with having 23 vacant Eligibility positions which would impact its future budget, because the ES series' salary had not been established yet, and because the department had EW vacancies for the E&T division, HR believed it was in the County's best interest to move forward in opening the recruitment for EW.

The County presented a recommendation at the Board of Supervisor's September 13, 2016 meeting to adopt the new class series with respective salary ranges and to change the allocations in the EA division as appropriate. Therefore, HR and HSD found themselves in a conundrum of having a number of individuals far into the hiring process for the Eligibility Worker classification and position allocations changed to the Eligibility Specialist classification in the midst of the hiring process. Based on institutional recollection, this was an unprecedented situation.

The EW I and ES I, entry level classifications, have essentially the same minimum qualifications and newly hired employees are in training for several weeks upon their start date. Additionally, the recent amendment to CSR 3.3b allows the reclassification and retention of incumbents provided they meet the minimum qualifications for the reclassified position. Using the Civil Service Rule definition of substitute position and the County Administrative Policy 4.2 allows departments to administratively change positions to a substituted position, HSD substituted a number of ES positions to EW positions for these newly hired individuals in order to rectify EW and ES and the timing of the hiring process with the reclassification process. Human Resources believes that reclassifying the 14 positions in EA from EW to ES, pursuant to the April 21, 2016 study outcome, and pursuant to CSR 3.3b, is the appropriate action.

Human Resources will also verbally review this situation and recommendation in more detail at the Commission's meeting.

Recommendation:

Human Resources recommends that the Civil Service Commission approve reclassification of 14 Eligibility Worker positions in the Economic Assistance Division of the Human Services Department to Eligibility Specialist pursuant to the April 21, 2016 study reclassifying all Eligibility Workers in Economic Assistance to the new series of Eligibility Specialist at the respective levels in the new job classification series; and retaining the incumbents in accordance with Civil Service Rule 3.3b.

**Sonoma County Human Resources Department
575 Administration Drive
Board of Supervisors Chambers Ste. 104A
Santa Rosa, CA 95403**

**CIVIL SERVICE COMMISSION MINUTES
Thursday, October 20, 2016 – 3:00 p.m.**

PRESENT *Commissioners:* John Hadzess, Tony Withington, Tricia Gwillim,
Mark Walsh, Pat Sabo
 Human Resources Staff: Christina Cramer, golbou ghassemieh, Maggie
Miller, Adriana Call
 Commission Counsel:

I. Call to Order

3:00 p.m.

II. Approval of Minutes of August 4, 2016

Motion: Commissioner Sabo
Second: Commissioner Walsh
Ayes: All

III. Director's Report

Human Resources Director, Christina Cramer, announced that Spencer Keyword, recruitment and Classification Manager would be out for a leave of absence for approximately 6 weeks. Ms. Cramer also announced that a new Classifications Analyst would be starting on Monday, October 24, 2016.

IV. Public Comment

Irene Rosario, SEIU Representative, submitted to the Commission, a formal written complaint.

Commissioner Withington noted that the written complaint should have been submitted to Human Resources, prior to the meeting, so that they would have time to meet with the Union regarding this complaint. He asked that the two parties discuss this matter.

Tony Walls, SEIU Shop Steward stated that there were outstanding appeals that had not been responded to.

Susan Lewitt, SEIU Representative, made a request for a waiver of probation with regard to Rule 8.4.

Staff response: HR Director indicated that she would review Civil Service Rule 8.4 at a future meeting.

CIVIL SERVICE COMMISSION MINUTES

October 20 , 2016

V. Reports

A. Position Reviews of Eight Positions in the Regional Parks Department by Ralph Anderson and Associates-Presented by Maggie Miller

Recommendation: HR recommends that one Environmental Discovery Center Coordinator position and one Aquatic Specialist position be reclassified to Department Program Manager, one Department Analyst position be reclassified to Accountant III, one Secretary position to be reclassified to Office Support Supervisor, two Office Assistant II positions be reclassified to Senior Office Assistant, and one Account Clerk II position and one Senior Office Assistant position be reclassified to Senior Account Clerk with the promotion of the incumbents in accordance with Civil Service Rule 3.3B.

Motion: Commissioner: Withington
Second: Commissioner: Gwillim
Ayes: All.

B. Position Reviews of One Payroll Clerk, Two Senior Account Clerks, and One Storekeeper in the Sheriff's Office Conducted by L.B. Hayhurst & Associates-Presented by Maggie Miller

Recommendation: HR recommends that the Commission approve the reclassification of one Payroll Clerk position to Department Analyst, two Senior Account Clerk positions to Payroll Clerks, and one Storekeeper position to Senior Storekeeper in the Sheriff's Office and the promotion of the incumbents in accordance with Civil Service Rule 3.3B.

Motion: Commissioner: Sabo
Second: Commissioner: Walsh
Ayes: All.

VI. Agenda Items

A. Update on Outstanding Classification Studies-Recruitment and Classification-Presented by Maggie Miller

VII. Other Scheduling Matters

VIII. Commissioners Open Session

Commissioner Withington requested that the Commissioners be given tours of departments such as the Sonoma County Jail, Honor Farm, Juvenile Hall, in order to have a better understanding of the locations being discussed during the meetings, and hearings. Tours will be scheduled every two months, after the beginning of the year. In addition, Commissioner Withington requested a "Workshop" with Counsel for the Commission, Jeff Walter to discuss Civil Service Rules, and conduct and protocol at Civil Service Hearings.

IX. Appeals

CIVIL SERVICE COMMISSION MINUTES

October 20 , 2016

X. Commissioners Closed Session

XI. Reconvene from Closed Session

XII. Adjourn

Meeting adjourned at 4:30 p.m.

Submitted by,

Christina Cramer s/n

Christina Cramer

Human Resources Director



MEMORANDUM

Date: October 20, 2016

To: Civil Service Commission

From: Maggie Miller, Principal Classification Analyst

Re: Position Reviews of Eight Positions in the Regional Parks Department Conducted by Ralph Andersen & Associates.

The Regional Parks Department requested that seventeen positions be reviewed to determine whether they are appropriately classified, and Ralph Andersen & Associates, a professional consulting firm, was retained to conduct these reviews. We are bringing forward eight of these reviews for which the consultant recommended reclassification to an existing County classification. For the represented classifications, Human Resources (HR) offered to Meet & Confer, and then reached agreement with SEIU on the recommendations in the Meet & Confer process. HR will bring the remaining nine position reviews forward once they are ready.

The following table summarizes the positions, their current classification, and the reclassification recommendation:

NAME	CURRENT CLASS	RECOMMENDED CLASS
Meda Freeman	Environmental Discovery Center Coordinator	Department Program Manager
David Robinson	Aquatic Specialist	Department Program Manager
Meredith Ferino	Department Analyst	Accountant III
June Douglas	Secretary	Office Support Supervisor
Kayla Martin	Office Assistant II	Senior Office Assistant
Charlotte Vrobek	Office Assistant II	Senior Office Assistant
Yvonne Hayes	Account Clerk II	Senior Account Clerk
Art Luna	Senior Office Assistant	Senior Account Clerk

HR has reviewed Ralph Andersen & Associates' findings and analysis and agrees that these recommendations are the most appropriate matches for the studied positions. Therefore, HR recommends that one Environmental Discovery Center Coordinator position and one Aquatic Specialist position be reclassified to Department Program Manager, one Department Analyst position be reclassified to Accountant III, one Secretary position be reclassified to Office Support Supervisor, two Office Assistant II positions be reclassified to Senior Office Assistant, and one Account Clerk II position and one Senior Office Assistant position be reclassified to Senior Account Clerk with the promotion of the incumbents in accordance with Civil Service Rule 3.3B.

Attached: Ralph Andersen & Associates, Part I: Classification Recommendations – Sonoma County Regional Parks Positions (annotated to reflect eight positions being presented).

June 29, 2016

TO: Lisa Conner, Supervising Human Resources Analyst
Sonoma County

FROM: Doug Johnson, Vice President
Jeff McMurdo, Consultant
Ralph Andersen & Associates

SUBJECT: Part I: Classification Recommendations – Sonoma County Regional Parks
Positions

Ralph Andersen & Associates was retained by Sonoma County to conduct a review of classification study requests received for seventeen positions within the Sonoma County Regional Parks Department. This memorandum provides a description of the study process and methodology used, an overview and analysis of the primary duties and responsibilities relative to each class study request, and our resulting recommendations.

Study Process and Methodology

Seventeen requests for class studies were submitted to *Ralph Andersen & Associates* for review. To ensure the analysis was comprehensive and accurate, background information was reviewed and interviews were conducted with each employee, as well as appropriate supervisory/management staff. This extensive interview process ensured the consultant had a complete understanding of each position, the overall organizational work unit, and the basis for the request.

In evaluating the information collected, a “whole job analysis” approach was used. With this approach, the following factors were considered:

- Duties and responsibilities
- Knowledge, skills, and abilities
- Decision-making
- Contacts.

In order to justify a reclassification, it is important that there be a material change in the level associated with the above factors and that the basis for the request is not simply an increase in the volume of work. Further, jobs may change as a result of reorganization or redistribution of work assignments, or because of changing technology requiring the use of new and/or different tools. However, this does not necessarily mean that a reclassification is justified if the level of difficulty, complexity, and responsibility has not increased.

POSITIONS STUDIED

Employee Name: Meda Freeman

Current Title: Environmental Discovery Center (EDC) Coordinator

Nature of Request: Working out of classification

Overview of Request and Analysis: Ms. Freeman is requesting a reclassification to more accurately reflect the nature and scope of the duties and responsibilities assigned to her position. The classification Ms. Freeman is assigned to of Environmental Discovery Center (EDC) Coordinator is responsible for managing, coordinating, developing, marketing, and promoting EDC programs, including fundraising and program design activities. Since Ms. Freeman was hired in 2011, she has never worked or performed any of the duties of the EDC Coordinator. It is our understanding that when the previous employee in the EDC Coordinator position was promoted to Recreation and Educational Services Manager, Ms. Freeman filled the position of EDC Coordinator because that was the title of the position on the books. However, it was never the intent for Ms. Freeman to perform the duties of EDC Coordinator. Ms. Freeman is responsible for overseeing the Marketing & Partnerships section within the Community Engagement Division including developing, managing, and evaluating communications, marketing, and public affairs programs in order to reach and engage Regional Park constituents and stakeholders. Specific duties include:

Marketing & Communications Duties (35% of duties)

- Developing, managing, and evaluating integrated marketing and communications programs.
- Identifying, creating, and distributing marketing content.
- Developing, managing, and evaluating the Regional Parks website.
- Developing and managing membership marketing.
- Developing, managing, and evaluating Regional Parks Annual Trails Challenge marketing program.

Public Affairs & Public Information Duties (35% of duties)

- Developing executive communications for Regional Parks Director including public presentations, talking points, scripts, speeches, research, reports, and other sensitive materials.
- Identifying emerging issues and challenges facing the Department.
- Representing the Department by making presentations and participating in community meetings.
- Coordinating Park openings and dedications.
- Developing and managing the Department's crisis communications plan and facilitating external communications during emergencies.
- Developing, managing, and evaluating Regional Parks' public information program.

Supervision Duties (10% of duties)

- Selecting, training, and supervising assigned staff.

Budgeting Duties (10% of duties)

- Participating in budget preparation.

Strategic Planning Duties (7% of duties)

- Participating in the Department's strategic planning.

In comparing these duties and responsibilities to other classifications within the County, Ms. Freeman's duties responsibilities are similar in scope, complexity, and level of responsibility to the County's Department Program Manager classification, i.e. just like the Department Program Manager, Ms. Freeman is responsible for planning, coordinating, managing, and reviewing the activities, performance, budget, and functions of a major program or group of closely related programs.

Findings and Recommendation: Based on the information above, *Ralph Andersen & Associates* finds that Ms. Freeman is performing duties that are consistent with the classification of Department Program Manager. It is therefore recommended that she be reclassified accordingly.



Employee Name: David Robinson

Current Title: Aquatic Specialist

Nature of Request: Working out of classification

Overview of Request and Analysis: Mr. Robinson is requesting a reclassification to more accurately reflect the nature and scope of his current duties and responsibilities. Prior to a year ago, Mr. Robinson was assigned to the Park Operations & Maintenance Division with responsibility for administering the day-to-day recreation and maintenance of the aquatic area including supervising lifeguard staff and training employees in aquatic emergency services and related subjects. However, due to a reorganization about a year ago within the Regional Parks Department, Mr. Robinson moved from the Park Operations & Maintenance Division to the Community Engagement - Programs Division and has taken on a variety of additional duties and responsibilities. In addition to continuing to manage and oversee the aquatics program, Mr. Robinson now has responsibility for planning, developing, achieving, and managing recreation, interpretive, and educational services programs. Specific duties include:

- Planning, developing, and managing recreational, educational, interactive programs and services and special events including assessing the quality of programs and services; overseeing the management of the Environmental Discover Center and related locations/centers; and managing and overseeing coordination of a variety of ongoing and annual programs and events at a variety of locations (20% of duties).
- Selecting, training, and supervising assigned staff (20% of duties).
- Participating in budget preparation (15% of duties).
- Serving as representative of the Department to various external groups and organizations (10% of duties).
- Preparing and composing a variety of reports and correspondence (10% of duties).
- Participating in and contributing to the Department's strategic planning process (5% of duties).

In comparing these duties and responsibilities to other classifications within the County, Mr. Robinson's duties and responsibilities are similar in scope, complexity, and level of responsibility to the County's Department Program Manager classification, i.e. just like the Department Program Manager, Mr. Robinson is responsible for planning, coordinating, managing, and reviewing the activities, performance, budget, and functions of a major program or group of closely related programs.

Findings and Recommendation: Based on the information above, *Ralph Andersen & Associates* finds that Mr. Robinson is performing duties that are consistent with the classification of Department Program Manager. It is therefore recommended that the position be reclassified accordingly.



Employee Name: June Douglas

Current Title: Secretary

Nature of Request: Working out of classification

Overview of Request and Analysis: Ms. Douglas is requesting a reclassification to an Office Support Supervisor to more accurately recognize the nature and scope of the duties and responsibilities assigned to her position. Ms. Douglas' responsibilities have expanded over the past several years to include a greater level of supervisory responsibility and involvement in overseeing the work of other line staff including conducting performance evaluations and signing off on these forms. Ms. Douglas is responsible for overseeing and supervising the work of the front office of the Administrative Division within the County Regional Parks Department. Specific duties include:

- Providing direct supervision of two full time employees and one to two temporary employees, including maintaining and approving employee timecards; evaluating and signing employee performance evaluations; organizing and managing work load for front office and membership drive; implementing, reviewing, and updating office procedures; communication with other County agencies; coordinating Park memberships; and reporting and coordinating building maintenance issues (40% of duties).
- Overseeing the fulfillment aspect of the Membership Program including hiring and training extra-help, temporary, or intern staff; ordering materials; facilitating changes; coordinating park memberships and promotional materials with field staff; processing and following-up on customer complaints; insuring all passes sold are entered; editing the database; downloading information; reviewing and revising procedural manual; tracking membership vouchers; coordinating discounts; and processing and fulfilling memberships via US mail or internet (25% of duties).
- Performing a variety of clerical and customer service duties for executive management and other staff (30% of duties).
- Performing special projects as assigned (5% of duties).

Ms. Douglas has been in her current classification of Secretary since she was hired into the position approximately eleven and a half years ago and has always felt that her duties and responsibilities were outside the scope of her current classification of Secretary.

The Secretary classification is responsible for serving as a secretary or personal assistant to a principal administrative employee and other professional and administrative staff employees of

a small County department or major division of a larger County department and may provide supervision for other clerical staff.

In comparing Ms. Douglas' duties and responsibilities listed above to the Secretary job description, *Ralph Andersen & Associates* agrees that she is performing duties that are outside the scope of the Secretary classification, specifically in that Ms. Douglas focuses more on supervising the front office staff on a day-to-day basis.

The Office Support Supervisor is responsible for planning, directing, evaluating, and participating in the work of an office support section. The distinguishing characteristics of this class are that this is the first-level supervisory class over Office Assistants and related classes, are full supervisors, and sign performance evaluations.

In comparing Ms. Douglas' duties to the Office Support Supervisor classification, *Ralph Andersen & Associates* agrees that the duties she is performing are more accurately reflected within this job description, i.e. serves as a first-level supervisor over Office Assistants and evaluates and signs employee performance evaluations.

Findings and Recommendation: Based on the information above, *Ralph Andersen & Associates* finds that Ms. Douglas is performing duties that are consistent with the classification of Office Support Supervisor. It is therefore recommended that the position be reclassified accordingly.



Employee Name: At time of study, position was occupied by Terri Froman; position currently occupied by Kayla Martin

Current Title: Office Assistant II

Nature of Request: Working out of classification

Overview of Request and Analysis: Ms. Froman is requesting a reclassification to a Senior Office Assistant based on an increase in responsibilities since being hired into the Office Assistant II classification in 2004.

The Office Assistant class series consists of three levels distinguished by performing duties that require varying degrees of knowledge related to the assigned area. As described in the job specification, the work is clerical in nature involving personal computer operation and other related office skills. The Office Assistant II is typically responsible for performing varied general and/or specialized office support duties. Duties may include: filing, reception, form processing, record maintenance, mail handling, personal computer operation, and typing.

The Senior Office Assistant is responsible for performing highly responsible and specialized clerical technical office support activities and may serve as a lead worker. Incumbents in this class regularly perform the highest level clerical tasks, and those that are the most complex or have the highest consequence of error and independence.

Ms. Froman is the sole clerical support position within the Park Reservations section supporting the Booking & Reservation Coordinator by independently performing a variety of duties related to park reservations. Specific duties include:

- Assisting the public with camping reservations including extensive customer service, assisting with booking camp sites, explaining rules, policies, and procedures, adjusting accounts, posting and consolidating stats for reports, developing and revising work procedures, and compiling and assembling a variety of information (55% of duties).

- Assisting the public with picnic reservations including extensive customer service, explaining rules, policies, and procedures, assisting with booking picnic sites, posting and consolidating stats for reports, compiling and assembling a variety of information, updating reservation calendar, and revising work procedures (16% of duties).

In addition, the position has been assigned additional responsibilities over the past years. New duties, or duties with an expanded scope of responsibility, include:

- Sole responsibility for the Commemorative Furniture/Children's Memorial Grove Paver programs for Sonoma County Regional Parks (13% of duties).
- Point person to resolve email/walk-in/phone-in camping issues (5% of duties).
- Creating and maintaining different filing/database systems (5% of duties).
- Assisting the Booking and Reservation Coordinator with any of their tasks as needed as well as overseeing and training extra-help staff (5% of duties).

Our review of the job duties indicates that 70% of the duties are beyond the more routine clerical duties performed by the Office Assistant II classification. Furthermore, our analysis recognizes that the County uses the Senior Office Assistant classification to recognize more specialized duties that are performed with a greater level of independence, and that there are many more Senior level positions than II level positions.

Findings and Recommendation: Ms. Froman does continue to perform some duties that are consistent with an Office Assistant II, but there is a natural overlap in duties and responsibilities between levels in a job family. While this overlap is expected, it is important to consider the overall scope of responsibilities, the type of decision-making, and the nature of new assignments. In reviewing the additional duties assigned to Ms. Froman, the majority of them are outside the scope of the Office Assistant II classification, i.e. Ms. Froman is independently performing a variety of highly responsible and specialized office support duties. Based on Ms. Froman's expanded duties within the Park Reservations section, *Ralph Andersen & Associates* recommends that the position be reclassified to a Senior Office Assistant.



Employee Name: At time of study, position was occupied by Rory Gibbens-Flores; position currently occupied by Charlotte Vrobel

Current Title: Office Assistant II

Nature of Request: Working out of classification

Overview of Request and Analysis: Ms. Gibbens-Flores had requested a reclassification to a Senior Office Assistant because her position performs many of the same duties as the Senior Office Assistant position within the front office support section. The front office support section has an Office Assistant II, Ms. Gibbens-Flores' position, and a Senior Office Assistant position that are both responsible for independently performing a variety of clerical and administrative support, membership sales, and customer service duties. Primary duties assigned to Ms. Gibbens-Flores include:

- Independently providing support functions for Park membership and merchandise sales including performing data entry, preparing passes and merchandise for mailing, and fulfilling orders by phone, internet, mail, and in-person (51% of duties).

- Providing email and phone customer service including answering incoming calls, responding to inquiries, concerns, and complaints, explaining policies and procedures, and routing inquires appropriately (15% of duties).
- Assisting customers at the front counter including assisting customers buying annual passes and permits and responding to a variety of inquires (10% of duties).
- Entering cash, checks, credit card, and internet orders into the cash register and reconciling register drawer at the end of the day (5% of duties).
- Entering a variety of information into databases (1% of duties).
- Maintaining a variety of statistical information on daily operations within the Parks' office (1% of duties).
- Maintaining Department calendar (1% of duties).
- Training and leading other clerical staff (as needed).

The Office Assistant class series consists of three levels distinguished by performing duties that require varying degrees of knowledge related to the assigned area. As described in the job specification, the work is clerical in nature involving personal computer operation and other related office skills. The Office Assistant II is typically responsible for performing varied general and/or specialized office support duties. Duties may include: filing, reception, form processing, record maintenance, mail handling, personal computer operation, and typing.

The Senior Office Assistant is responsible for performing highly responsible and specialized clerical technical office support activities and may serve as a lead worker. Incumbents in this class regularly perform the highest level clerical tasks and those that are the most complex or have the highest consequence of error and independence.

Based on the information above as well as discussions with management staff, Ms. Gibbens-Flores is performing duties similar in nature and scope as the other Senior Office Assistant within the front office, i.e. independently performs the highest level clerical tasks within the front office. Our review of the job duties indicates that 70% of the duties are beyond the more routine clerical duties performed by the Office Assistant II classification. Furthermore, our analysis recognizes that the County uses the Senior level classification to recognize more specialized duties that are performed with a greater level of independence, and that there are many more Senior level positions than II level positions.

Findings and Recommendation: Ms. Gibbens-Flores' position does continue to perform some duties that are consistent with an Office Assistant II, but there is a natural overlap in duties and responsibilities between levels in a job family. While this overlap is expected, it is important to consider the overall scope of responsibilities, the type of decision-making, and the nature of assignments. In reviewing the duties assigned to Ms. Gibbens-Flores' position to the Senior Office Assistant job specification as well as compared to the other Senior Office Assistant position in the front office, *Ralph Andersen & Associates* agrees that the duties she is performing are more accurately reflected within the Senior Office Assistant job specification, i.e. Ms. Gibbens-Flores' position independently performs highly responsible and specialized clerical technical office support activities. Based on this, *Ralph Andersen & Associates* recommends that the position be reclassified to a Senior Office Assistant.



Employee Name: Meredith Ferino

Current Title: Department Analyst

Nature of Request: Working out of classification – Requested by Department

Overview of Request and Analysis: The request to study Ms. Ferino's position was initiated by the Department's request to review all administrative positions during the course of that study. The duties, knowledge, skills, and abilities of Ms. Ferino's position are more in-line with the Accountant III classification than her current classification of Department Analyst. Ms. Ferino is responsible for performing professional accounting work as well as supervising the work of clerical and technical staff. Specific duties include:

- Supervising, training, reviewing, and evaluating clerical and technical accounting section (16% of duties).
- Providing budget support including preparing and updating reports and preparing adjustments and supporting documentation (14% of duties).
- Reviewing and approving all accounting transactions (11% of duties).
- Performing capital project budgeting functions including monitoring and tracking budgets, calculating budget adjustments, reviewing board items, entering budget data, and preparing documents (10% of duties).
- Preparing a variety of complex accounting reports (20% of duties).
- Coordinating and preparing year-end functions (8% of duties).
- Performing complex revenue allocations/bank account reconciliations and general ledger tracking/reconciling (6% of duties).

Ms. Ferino has been in her current classification of Department Analyst since she was hired into the position about a year ago and has always felt that her duties and responsibilities were outside the scope of her current classification of Department Analyst and more in line with the Accountant III classification.

The Department Analyst classification is responsible for conducting analytical studies involving the operations and programs of a department to develop, improve, and/or implement new or existing programs, systems, procedures, and/or administrative services.

The Accountant III is responsible for supervising and participating in the work of an accounting division in a small to medium-sized department or performs the more difficult and complex accounting in a large department.

In comparing Ms. Ferino's duties to her current classification of Department Analyst as well as the Accountant III classification, *Ralph Andersen & Associates* agrees that the duties she is performing are more accurately reflected within the Accountant III job specification, i.e. Ms. Ferino is responsible for supervising and participating in the work of the accounting division within the Regional Parks Department.

Findings and Recommendation: Based on the information above, *Ralph Andersen & Associates* finds that Ms. Ferino is performing duties that are consistent with the classification of Accountant III. It is therefore recommended that the position be reclassified accordingly.



Employee Name: Yvonne Hayes

Current Title: Account Clerk II

Nature of Request: Working out of classification

Overview of Request and Analysis: Ms. Hayes is requesting a reclassification because she feels the duties she is performing are above her stated job class of Account Clerk II. In evaluating Ms. Hayes' position, *Ralph Andersen & Associates* compared her duties to the Account Clerk series as well as the Accounting Technician classification.

The Account Clerk class series consists of three levels distinguished by performing duties requiring varying degrees of knowledge. As described in the job specification, incumbents perform a variety of bookkeeping activities related to the maintenance and review of financial and statistical records. The Account Clerk II is the journey-level class in the series and is responsible for a segment of work within the scope of a larger bookkeeping program or record keeping system.

The Senior Account Clerk is the advanced working level within the series and as such exercises a detailed subject matter knowledge of a specific bookkeeping program area or a specialized statistical or record keeping system. Further, the Account Clerk II may be distinguished from the Senior Account Clerk in that the latter is the advanced working level in the Account Clerk series, and as such, performs the assigned duties with independence and discretion.

The Accounting Technician performs specialized and complex technical accounting work and fiscal clerical work in connection with reviewing, processing, and recording financial, statistical, or fiscal records. The class of Accounting Technician is distinguished from classes in the Account Clerk series in that incumbents are responsible for performing highly complex technician level accounting work. Further, Accounting Technician positions are found in the fiscal departments or larger operating departments where they are assigned the responsibility for a major accounting system; or in smaller departments where they are the only or the highest level accounting staff, and are responsible for monitoring and implementing a complex accounting system.

Ms. Hayes is responsible for working with a variety of different accounting systems in performing assigned accounting duties. Specific duties include:

- Performing all accounts receivable functions for the Department including performing complex reconciliations, data tracking, and reports (50% of duties).
- Serving as the lead for office and field staff on deposits (24% of duties).

In addition, since Ms. Hayes started in her position she has been assigned the responsibility for the implementation of the new point-of-sale (POS) system including testing, reporting issues, and training of staff. Further, it is our understanding that after the implementation of the system, Ms. Hayes will continue to be the lead staff on the system including resolving system problems, identifying enhancement, serving as liaison with the system vendor, and staff training.

In comparing Ms. Hayes' duties and responsibilities to both the Account Clerk series as well as the Accounting Technician classification, *Ralph Andersen and Associates'* analysis indicates that the duties she is performing are outside the Account Clerk II classification, and are more accurately reflected in the Senior Account Clerk classification, i.e. the duties related to serving as lead for office and field staff and the responsibility for the implementation and continued support of the POS system are at an advanced clerical accounting level. While some of the duties may be considered technical in nature, they are not at the level of the Accounting Technician, as

Ms. Hayes is not responsible for a major accounting system nor does she serve as the only accounting staff of the Department.

Findings and Recommendation: Based on the information above, *Ralph Andersen & Associates* finds that Ms. Hayes is performing duties that are consistent with the classification of Senior Account Clerk. It is therefore recommended that she be reclassified accordingly.



Employee Name: Arthur Luna

Current Title: Senior Office Assistant

Nature of Request: Working out of classification

Overview of Request and Analysis: Mr. Luna is requesting a reclassification to more accurately reflect the nature and scope of the duties and responsibilities assigned to his position. The classification Mr. Luna is assigned to of Senior Office Assistant is responsible for performing highly responsible and specialized clerical technical office support activities. Since Mr. Luna was hired, he has never performed duties consistent of the Senior Office Assistant classification. Mr. Luna is assigned to the accounting services section within Sonoma County Regional Parks and is responsible for providing accounting support for management including providing cost accounting reports from a variety of databases as well as providing day-to-day operational support for pay stations within the Parks. Specific duties include:

- Assisting staff with long-term and special cost accounting projects that require statistical research (as needed).
- Assisting in preparing operational or workflow instructions, spreadsheets, databases, and training or orienting employees in the use of databases, code configuration, and reports (as needed).
- Performing payroll data processing from Excel to Access and the Enterprise Financial System (EFS) (20% of duties).
- Creating and updating a variety of specialized reports based on labor, expenses, or revenue upon request and updating reoccurring reports as necessary (35% of duties).
- Serving as administrator for the Departments' user code structure including creating new codes, updating code lists, and making recommendations for why new codes should be structured in a specific configuration (10% of duties).
- Researching financial data for reports (7% of duties).
- Creating, maintaining, and updating Access labor databases as needed (5% of duties).
- Performing pay station database administration including user management, new station set-ups, and daily review of station status (2% of duties).
- Serving as first contact for field staff regarding pay station problems including serving as the technical expert on trouble shooting pay station problems and determines the course of action to resolve the problems (5% of duties).
- Serving as contact person for vendor (5% of duties).
- Making recommendations to management staff regarding upgrades for pay stations (1% of duties).

In comparing Mr. Luna's duties and responsibilities outlined above to the Senior Office Assistant job description, *Ralph Andersen & Associates* agrees that Mr. Luna is performing duties that are outside the scope of the Senior Office Assistant classification and more appropriately reflected in the clerical/technical accounting series. Since Mr. Luna performs a variety of clerical/technical accounting activities, *Ralph Andersen & Associates* compared Mr. Luna's duties and responsibilities to the job descriptions for the Account Clerk series as well as the Accounting Technician.

The Account Clerk class series consists of three levels distinguished by performing duties requiring varying degrees of knowledge. As described in the job specification, incumbents perform a variety of bookkeeping activities related to the maintenance and review of financial and statistical records. The Account Clerk II is the journey-level class in the series and is responsible for a segment of work within the scope of a larger bookkeeping program or record keeping system.

The Senior Account Clerk is the advanced working level within the series and as such exercises a detailed subject matter knowledge of a specific bookkeeping program area or a specialized statistical or record keeping system. Further, the Account Clerk II may be distinguished from the Senior Account Clerk in that the latter is the advanced working level in the Account Clerk series, and as such, performs the assigned duties with independence and discretion.

The Accounting Technician performs specialized and complex technical accounting work and fiscal clerical work in connection with reviewing, processing, and recording financial, statistical, or fiscal records. The class of Accounting Technician is distinguished from classes in the Account Clerk series in that incumbents are responsible for performing highly complex technician level accounting work. Further, Accounting Technician positions are found in the fiscal departments or larger operating departments where they are assigned the responsibility for a major accounting system; or in smaller departments where they are the only or the highest level accounting staff, and are responsible for monitoring and implementing a complex accounting system.

In comparing Mr. Luna's duties and responsibilities to both the Account Clerk series as well as the Accounting Technician classification, *Ralph Andersen and Associates'* analysis indicates that the duties he is performing are more accurately reflected in the Senior Account Clerk classification, i.e. the duties related to cost accounting and lead support for the pay stations are at an advanced clerical accounting level. While some of the duties may be considered technical in nature they are not at the level of the Accounting Technician, as Mr. Luna is not responsible for a major accounting system or serve as the only accounting staff for the Department.

Findings and Recommendation: Based on the information above, *Ralph Andersen & Associates* finds that Mr. Luna is performing duties that are consistent with the classification of Senior Account Clerk. It is therefore recommended that the position be reclassified accordingly.



If you have any questions or would like to discuss further, please do not hesitate to call me at (916) 630-4900.



MEMORANDUM

Date: October 20, 2016

To: Civil Service Commission

From: Maggie Miller, Principal Classification Analyst

Re: Position Reviews of One Payroll Clerk, Two Senior Account Clerks, and One Storekeeper in the Sheriff's Office Conducted by L.B. Hayhurst & Associates

The Sheriff's Office submitted position review study requests for one Payroll Clerk and two Senior Account Clerk positions assigned to its Payroll Unit, and for one Storekeeper assigned to the Purchasing Unit. These reviews were conducted by L.B. Hayhurst & Associates, a professional consulting firm, and the consultant's full report on these position review studies is attached.

The Payroll Clerk position has full supervisory responsibility for the two Senior Account Clerk positions within the Payroll Unit, with oversight of the Office's complex processing demands. However, 49% of the position's time is devoted to managing a wide variety of leaves (e.g., Workers' Compensation, CA Labor Code § 4850, pregnancy disability, bonding, administrative, family, etc.) including considerable coordination with both the Human Resources Department and the Auditor-Controller-Treasurer-Tax Collector's Payroll Division. Additionally, the position is the lead for on-boarding efforts for the Office. Accordingly, L.B. Hayhurst & Associates determined that the duties have expanded beyond the bounds appropriate for the Payroll Clerk class and, after reviewing other County classifications, identified Department Analyst as the most appropriate match given this classification's ability to supervise staff and to both analyze and provide professional level support in administrative decision making.

The two Senior Account Clerk positions assigned to the Office's Payroll Unit perform duties that are predominately focused on payroll processing (including timecard review and adjustment, tracking probationary periods and due dates for both evaluations and pay increases, and leaves) and on processing payroll adjustments. These positions also communicate with staff about a range of payroll-related issues (e.g., benefits changes, withholding, and payroll policies/procedures). L.B. Hayhurst & Associates found that these dedicated payroll functions are not covered by the Senior Office Assistant classification, and determined that Payroll Clerk is the appropriate classification within the County structure.

The Storekeeper position assigned to the Office's Purchasing Unit is responsible for ordering, receiving, storing, and delivering supplies for the Office, including specialized equipment (exclusive of firearms) required for law enforcement operations. The position is also responsible for researching the pricing and availability of materials, for facilitating the repair of portable radio and radio equipment, and for coordinating the salvage/disposal of obsolete or unusable equipment. Although most of the position's time is focused on its purchasing and inventory functions, it does spend approximately 15% of its time handling the delivery of

departmental mail and preparing the Unit's monthly Cal-Card statement. L.B. Hayhurst & Associates found that the position functions with a great degree of independence, tracks budget-related expenditures through the CalCard process, and purchases specialized radio and officer personal gear equipment. Since level of independence and the specialized nature of the duties required for researching and ordering equipment are significant factors in the distinction between the Senior Storekeeper and Storekeeper classifications, the consultant found that the position would be more appropriately classified as a Senior Storekeeper.

Therefore, HR recommends that the Commission approve the reclassification of one Payroll Clerk position to Department Analyst, two Senior Account Clerk positions to Payroll Clerks, and one Storekeeper position to Senior Storekeeper in the Sheriff's Office and the promotion of the incumbents in accordance with Civil Service Rule 3.3B.

Attached: L.B. Hayhurst & Associates, Classification Study – Sheriff's Office Classification Studies





**L.B. HAYHURST
& ASSOCIATES**

**COUNTY OF
SONOMA**

**SHERIFF'S OFFICE
CLASSIFICATION
STUDIES**

Preliminary Report

2016



*We
bring
Real World
Experience
to employer
issues.*

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SANTA ROSA, CALIFORNIA 95403-1613

**COUNTY OF
SONOMA**

**SHERIFF'S OFFICE
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STUDIES**

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L. B. HAYHURST & ASSOCIATES

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EXECUTIVE SUMMARY

The County of Sonoma Sheriff's Office had requested classification reviews of three (3) positions within the Payroll function and one (1) position within the Purchasing function of the Administrative Services Division. L.B. Hayhurst & Associates was contracted to conduct the studies. The focus of these reviews is to determine whether assignments given to the current incumbents of the positions are within the scope and level of responsibilities of the current classification.

This document represents the findings of the reviews and is organized by the operational function and current classifications.

Incumbent – This is the name of the individual who occupied the position at the time of the interviews.

Interviewed – This section lists those individuals that were interviewed by the Consultant to gather information regarding the duties and assignments of the studied positions.

Analysis/Issues - This section provides a detailed discussion regarding information developed during the study that led to the findings for each of the requested studies.

Recommendations - This section provides the findings and recommendations made by this consultant based on the information provided and the detailed discussion of the analysis provided in each section.

The following is a summary of the recommendations made as a result of our review:

➤ **PAYROLL** –

Payroll Clerk:

Reclassify and reallocate the position of Payroll Clerk to the current county-wide classification of Department Analyst.

Reclassify the current incumbent Lisa Bratton to the classification of Department Analyst (i.e. promote the incumbent per Sonoma County Civil Service Rule 3.3B).

Senior Account Clerk:

Reclassify and reallocate two (2) positions of Senior Account Clerk to the current classification of Payroll Clerk.

Reclassify the current incumbents Dinna Deegan and Kara Kukulka to the classification of Payroll Clerk (i.e. promote the incumbents per Sonoma County Civil Service Rule 3.3B).

➤ **PURCHASING –**

Storekeeper:

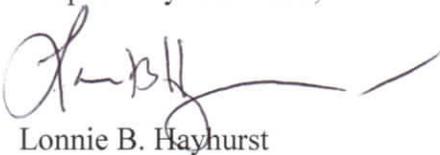
Reclassify and reallocate the position of Storekeeper to the existing classification of Senior Storekeeper.

Reclassify the current incumbent Rebecca Suomala to the classification of Senior Storekeeper (i.e. promote the incumbent per Sonoma County Civil Service Rule 3.3B).

The recommendations made above are based on an understanding that a classification plan must remain consistent not only within a department, but also on a county-wide basis. Positions performing a set of duties in one department must be placed in the same classification as other positions performing similar duties elsewhere.

We would like to thank the various employees, supervisors and managers interviewed for their courtesy and willingness to adjust busy schedules to meet with us. The information that they provided was invaluable in assisting us in making our determinations and recommendation.

Respectfully submitted,



Lonnie B. Hayhurst
President/CEO
August, 2016

SCOPE OF STUDIES

The County of Sonoma and the Sheriff's Office requested that four classification reviews occur within the Sheriff's Office. These studies are to include the following activities:

1. Conduct an orientation with the incumbents and supervisors to distribute the County's Position Description Questionnaire and discuss the nature and process of the study.
2. Review the completed positions questionnaires (PDQ) by the incumbents and current class descriptions as they relate to possible reclassifications.
3. Perform a classification study to compare duties and job descriptions, which is to include interviewing the incumbents, the incumbent's supervisor and consulting with Human Resource Staff.
4. Make recommendations regarding the appropriate classification and level for the studied positions. Develop new classifications and salary recommendations if needed.
5. Provide a preliminary report for staff and management review.
6. Prepare a final report including additional information gathered during the review process.

METHODOLOGY

The classification reviews of each of the requests was conducted in the following manner:

- ❖ Maggie Miller, Principal Classification Analyst provided written information, including the current job specifications and related information to the Consultant.
- ❖ The incumbents of the positions completed Position Description Questionnaires (PDQs). In the Payroll function the two (2) incumbents of the Account Clerk III positions completed their PDQ together.

- ❖ Individual interviews were held on with the incumbents, supervisors and managers. The general focus of these interviews was to gain insight into the work and responsibilities assigned to the positions studied, how the work has changed, the various organizational structures, and to discuss any particular concerns of the employees, supervisor and manager. These interviews also allowed the Consultant to opportunity to clarify individual assignments and the unique features for the studied positions within departmental operations.
- ❖ Following the interviews an analysis of all factors was conducted and findings were developed.

PAYROLL –

Class: Payroll Clerk

Incumbent: Lisa Bratton

Interviewed: Heidi Keith, Administrative Services Director
Lisa Bratton, Payroll Clerk

Analysis/Issues:

The current incumbent of this position is Lisa Bratton who has filled the position for over five (5) years. Ms. Bratton reports to the Administrative Services Director in the Sheriff's Office. Ms. Bratton supervises two (2) position of Senior Account Clerk (these positions are also under study in this report). Ms. Bratton supervises staff engaged in the payroll processing and other Human Resource functions for the approximately 700 employees within the Sheriff's Office.

Ms. Bratton's current assignments include the following major duties:

- Providing direct supervision including overseeing, evaluating, training, and disciplining two (2) Senior Account Clerks involved in the timely and accurate processing of payroll and related activities for all employees within the department; ensures compliance with MOU's and other policies related to payroll. Approximately 25% of the time.
- Managing and tracking all medical leaves for the Sheriff's Office, including Labor Code 4850 leaves, Workers' Compensation leave, occupational and non-occupational leave, pregnancy disability leave, bonding leave, administrative leave, family leave, etc.; prepares appropriate documentation and enters information into processing system for use in Human Resources and the Auditor's Office; meeting with employees, representatives and management to explain leaves and related laws and policies. Approximately 33% of the time.
- Determining employees' eligibility for temporary transitional work based on medical restrictions given by medical providers; works with the Human Resources staff and managers to find suitable positions; prepares contracts for agreements; updates contracts with medical certifications as appropriate. Approximately 9% of the time.
- Serving as the direct resource for interpreting and communicating appropriate provisions of the department's seven (7) separate Memorandums of Understanding for employees and management within the department. Approximately 10% of the time.

- Arranging for interactive process meeting regarding accommodations as required by the County’s Disability and Reasonable Accommodation policy for Sheriff Office employees; preparing follow-up documents and notifying interested parties. Approximately 7% of the time.
- Conducting New Hire Orientation for new employees explaining policies, practices, and benefits; assisting employees in the completion of all required new hire forms for payroll and benefit related processing; entering information into Human Resource Management System files. Approximately 4% of the time.

As can be seen above the focus of this position is to ensure the timely and accurate processing of the Sheriff’s Office payroll, but also the accurate recording of position allocations, disability management for the department, and maintaining a variety of on-going monitoring of leaves.

The Definition of a Payroll Clerk as stated in the class specification is:

“Under direction, determines, summarizes and maintains payroll and personnel actions which affect the status and payment of employees in a large County department or are responsible for a County-wide payroll control function; may act as a lead worker over one or more clerical employees performing duties related to payroll processing; and perform related duties as required.”

This classification has the following “Distinguishing Characteristics”:

“Incumbents in this job class perform responsible duties requiring the analysis and evaluation of payroll problems, application of state and federal taxing laws and regulations, employees’ rights as specified in memorandum of understanding, and the application of complex payroll policies and procedures. Incumbents act as the principal payroll authority in a large County department or are responsible for a defined County-wide payroll function.”

In analyzing the duties and responsibilities of Ms. Bratton, it is clear that she not only serves as a full supervisor over the Sheriff’s Office complex payroll, but much of her work time is involved in disability and leave management activities at the department level. These responsibilities go beyond just supervising the maintenance and processing payroll documents and related forms.

In our analysis we researched what classifications are used by the County in other large departments.

The first classification we considered is Administrative Aide which is defined as:

“Under general supervision, performs paraprofessional work in one or more of several functional administrative programs; responsible for the technical administrative work of a small service program; performs research on a wide variety of special and ongoing projects; and performs related duties as required.”

The examples of duties listed on this specification do not represent the scope and complexity that characterize the supervision of the Sheriff's Office payroll, with 700 employees covered by 7 bargaining agreements, and multiple shift, cost center, and premium pays. Therefore, we do not consider Administrative Aide to be appropriate for this position.

The second classification we evaluated is Department Analyst. The definition of a Department Analyst in Sonoma County is:

“Under direction, conducts analytical studies involving the operations and programs of the department to develop, improve, and/or implement new or existing programs, systems, procedures, and/or administrative services; provide professional level staff support in the decision making process; and performs related duties as required.”

The criticality of Ms. Bratton's responsibilities and level of program and supervisory responsibility have a high consequence of error for the department and the County. Therefore the position's responsibilities are aligned with the professional level of the Department Analyst classification.

We found that the five (5) County Department (District Attorney, General Services, Permit & Resource Development, Regional Parks, and University of California Cooperative Extension) have Department Analyst positions with significant human resources responsibilities, that often include leave coordination and/or payroll oversight. Further, we found that the Department of Health Services, a very large and complex department, has a Department Analyst directly responsible the department's return to duty and various leave management efforts. The scope and complexity of duties performed by this position are closely comparable to that required of the studied positions in the Sheriff's Office. Therefore, in keeping with the County's expressed concern to maintain a consistent use of classifications across department lines, we can see no reason to create a new distinct classification, and recommend that it be reclassified to Department Analyst.

Recommendations:

- Reallocate the position of Payroll Clerk to the current County-wide classification of Department Analyst.
- Reclassify the current incumbent Lisa Bratton to the classification of Department Analyst.

Class: Senior Account Clerk

Incumbents: Dinna Deegan and Kara Kukulka

Interviewed: Heidi Keith, Administrative Services Director
Lisa Bratton, Payroll Clerk

Analysis/Issues:

Dinna Deegan and Kara Kukulka are the current incumbents of the Senior Account Clerk positions allocated to the Payroll function in the Sheriff's Administrative Services Division. These two individuals report directly to position that is discussed above, a Payroll Clerk. Neither of the incumbents have on-going lead worker duties. The focus of these positions is the processing of payroll for the Sheriff's Office staff. Duties focus on ensuring the timely processing of payroll including specialty pays, shift differentials, and other related benefits and premiums.

Examples of the primary duties include:

- Reviewing timecard to ensure accuracy regarding hours worked, overtime, and shift differentials; auditing timecards for cost coding changes, compensation accrual maximum; printing reports to compare payroll information and look for discrepancies; contacting supervisors and managers to make necessary correction on timecard information, and obtaining employee signatures; cross checking reports and payroll data to identify incorrect payments. Approximately 30% of the time.
- Communicating with employees on the phone, email, or in person to make changes to benefits, personal information updates, marital status changes, dependent changes, tax changes, deferred compensation change, etc.; providing information to employees on benefits and other pay related policies and procedures. Approximately 15% of the time.
- Tracking information and notify supervisors and managers of upcoming and past due evaluations, merit increases, probation ending events; tracking relevant hours for various employee actions; maintaining accurate records relating to actions. Approximately 12% of the time.
- Processing adjustments, back pay, labor corrections, and promissory notes; identifying errors in pay and making necessary calculation to do appropriate payroll adjustments; preparing documentation for submission to the Auditor to make payroll adjustments; entering information in the computerize system of records. Approximately 7% of the time.
- Maintaining records regarding employee leaves and disabilities; assisting the supervisor in leave related recordkeeping. Approximately 4% of the time.
- Processing the necessary documentation for voluntary demotions and temporary promotes. Approximately 2% of the time.

The two studied positions are currently classified as Senior Account Clerks. The Definition of a Senior Account Clerk is:

“Under general supervision, performs responsible bookkeeping work involved in keeping and reviewing financial and/or statistical records; may provide lead direction to clerical accounting personnel engaged in bookkeeping, accounting and/or statistical record keeping activities;

confers with representatives of other departments and agencies regarding financial procedures and record keeping activities; and performs related duties as required.”

In reviewing the examples of duties in the Senior level class specification we find no mention of payroll, benefits processing, or other related leave recording duties. The processing of payroll in the Sheriff’s Office is a very specialized field requiring a broad set of knowledge, skills, and abilities that differ significantly from general financial accounting and book keeping.

The Payroll Clerk class specification states as a definition:

“Under direction, determines, summarizes and maintains payroll and personnel actions which affect the status and payment of employees in a large County department or are responsible for a County-wide payroll control function; may act as a lead worker over one or more clerical employees performing duties related to payroll processing; and perform related duties as required.”

The examples of duties listed on this specification are very consistent with the duties assigned to the two incumbents. For example, duties include setting up and maintaining time records, reviewing payroll reports to ensure accuracy, interpreting salary ordinances, policies, procedures, payroll coding systems, preparing and maintaining leave and other related records; preparing notices of pending actions.

While the class specification for Payroll Clerk seems to indicate that the “incumbents act as the principal payroll authority in a large County department or are responsible for a defined County-wide payroll control function”, our research shows that Health Services has two (2) allocated positions and Human Services has four (4) positions allocated at this level. These positions are processing payroll for large departments in a similar way as the incumbents of these studied positions. It should be stated also that the Sheriff’s Office has over 700 employees, covered by 7 bargaining agreements, the department has multiple shift, cost center, and premium pays. This requires that the individuals performing the responsibilities assigned here are extremely knowledgeable in payroll related processes.

An analysis of the duties and responsibility assigned to Ms. Deegan and Ms. Kukulka seems to demonstrate that they are currently working outside the scope of their classification of Senior Account Clerk.

Recommendations:

- Reallocate two (2) positions of Senior Account Clerk to the current classification of Payroll Clerk.
- Reclassify the current incumbents Dinna Deegan and Kara Kukulka to the classification of Payroll Clerk.

PURCHASING –

Class: Storekeeper

Incumbent: Rebecca Suomala

Interviewed: Heidi Keith, Administrative Services Director
Connie Newton, Administrative Aide
Rebecca Suolmala, Storekeeper

Analysis/Issues:

The Sheriff's Office Purchasing function currently has one position of Storekeeper. The incumbent of the position is Rebecca Suomala. She has occupied this position for approximately ten (10) years. Ms. Suomala reports to an Administrative Aide and has no supervisory or lead worker responsibilities. Ms. Suomala works under direction and independently during her day-to-day assignments seeking direction on only specialized issues or when changing procedures and processes. Ms. Suomala is the only person assigned storekeeping related position in the department.

The purpose of this position is to purchase, store and issue goods and materials while maintaining an accurate inventory.

This position is assigned the following major functions and responsibilities:

- Completes order forms, contacts vendors, researches pricing, and availability of materials and places orders by phone, fax, or internet; researches catalogs and other materials to ascertain the best products to fill specific functions; supplies cost data to supervisor and/or managers. Approximately 10% of the time.
- Stores materials in proper location using established procedures, pulls materials from shelves, and completes proper documentation; operates forklift and other equipment to receive, store, and deliver materials and supplies; lifts and moves materials and supplies; may assemble furniture and other equipment. Approximately 10% of the time.
- Collects, sorts, and delivers interdepartmental and US mail within the main office to court security, radio shop, and Adult Detention Facility. Approximately 10% of the time.
- Facilitates portable radio and radio equipment repair work orders with vendors, including determining vendors, contacting vendors to determine payments and/or warranties; prepares radios for shipping. Applies inventory tags to new radios and equipment and enters information into tracking system. Approximately 10% of the time.

- Receives materials from a variety of delivery services, checks for damage, quality and whether materials match packing slip; reports discrepancies or damaged material to purchasing staff, and assists in corrections when asked to do so. Approximately 5% of the time.
- Sorts, salvages, or disposes of obsolete or unusable materials. Approximately 5% of the time.
- Processes the monthly Purchasing Cal-Card statement, including matching invoices to the packing slips and associated documents and creating a spreadsheet showing all purchases. Approximately 5% of the time.
- With the exception of firearms, issues “duty gear” to new officers, issues replacement gear when appropriate, and tracks gear in an automated system. Approximately 5% of the time.

It should be noted that while many of the materials and supplies ordered, stored, inventoried, and disbursed are office supplies, the unique nature of a law enforcement operation requires specialized equipment, including radios and field gear.

The job description for a Storekeeper defines the class as:

“Under direction, orders, receive, stores, delivers and accounts for supplies, materials and equipment for a single County department; performs related work as required.”

While the definition of a Senior Storekeeper is:

“Under direction, participates in the ordering, receiving, storing, issuing, delivering and accounting for supplies, materials and equipment in a County department; may supervise subordinate staff; and performs related work as required.”

The “Distinguishing Characteristics” for the Senior class states:

“Senior Storekeepers are advanced journey level workers in the Storekeeping series. It differs from the class of Storekeeper in that the Senior Storekeepers work independently to track expenditures for budget purposes, purchase specialized parts and may supervise subordinate staff. Some assignments require considerable knowledge of specialized materials, supplies and equipment...”

It was stated by the direct supervisor and manager of Ms. Suomala that she works independently and has full daily responsibility for the supplies and materials need for Sheriff’s Office operations. These responsibilities include ordering and repair of radio equipment in support of the radio shop, ordering, storing and issuing of the deputies personal gear with the exception of fire arms. Further Ms. Suomala tracks Cal-Card expenditures, does independent product and costing research which is provided to management or purchasing staff.

Ms. Suomala does not supervise or lead other staff, but the Senior level class specification indicates this is a “may” supervise level.

Recommendations:

- Reclassify and reallocate the position of Storekeeper to the existing classification of Senior Storekeeper.

Reclassify the current incumbent Rebecca Suomala to the classification of Senior Storekeeper.