Civil Service Commission

1055 MONTEREY STREET, SUITE D250 ◆ SAN LUIS OBISPO, CALIFORNIA 93408 ◆ 805.781.5959

San Luis Obispo County Civil Service Commission

Regular Session Meeting

Wednesday December 19, 2012 @ 9:00 AM.

1055 Monterey Street, Suite D-271 San Luis Obispo, CA

AGENDA

MEMBERS OF THE COMMISSION
Jeannie Nix, President
Jay Salter, Vice President
William Tappan
Robert Bergman
Arthur Chapman

1. **Call to Order / Flag Salute / Roll Call**

2. **Public Comment Period**
   Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the President. Presentations are limited to three minutes per individual.

3. **Minutes**
   The following minutes are submitted for approval:
   a. November 28, 2012 – Regular

4. **Reports**
   a. Commission President
   b. Commission Counsel
   c. Commission Subcommittees
   d. Commission Secretary
      1. Commission 2013 Calendar

5. **Job Class Specifications – For Informational Purposes Only (No Action)**
   a. Administrative Services Manager
   b. Assessment Manager
   c. Social Worker

6. **Recognition**
   Express appreciation to CSC President Jeannie Nix and Vice President Jay Salter for their work with the Commission.

7. **Adjournment**

The San Luis Obispo County Civil Service Commission

Regular Session Meeting

Wednesday November 28, 2012 @ 9:00 A.M.

1055 Monterey Street, Suite D-271, San Luis Obispo, CA

MINUTES

MEMBERS OF THE COMMISSION
Jeannie Nix, President
Jay Salter, Vice President
William Tappan
Robert Bergman
Arthur Chapman

Present: President Jeannie Nix, Commissioner Art Chapman, Commissioner Robert Bergman, Commissioner Bill Tappan

Absent: Vice President Jay Salter

Staff: Commission Secretary Tami Douglas-Schatz; Commission Clerk Robin Mason

Counsel: Tim McNulty, Commission Counsel; Steve Simas, Commission Outside Counsel

1. Call to Order/ Flag Salute/ Roll Call

President Nix called the meeting to order at 9:02 A.M. and led the flag salute.

2. Public Comment Period

Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the President. Presentations are limited to three minutes per individual. Being none, President Nix closed the Public Comment Period.

3. Minutes

October 24, 2012

A motion was made by Commissioner Tappan and seconded by Commissioner Chapman to approve the October 24, 2012 regular meeting minutes as corrected; the motion carried 4-0-1.

4. Reports

a. Commission President

President Nix had nothing to report.

b. Commission Counsel

Tim McNulty had nothing to report.

c. Commission Outside Counsel

Steve Simas presented a training outline to the Commission using Power Point: http://www.slocounty.ca.gov/Assets/PE/CSC/CSC+Supporting+Docs/Intro+to+appeals+process+and+hearings.pdf

President Nix: opened the public comment period and closed the public comment period after SLOCEA General Manger Kimm Daniels commented.

DRAFT

d. **Commission Subcommittees**
Commissioner Tappan had nothing to report.

e. **Commission Secretary**
Disbandment of the Ad Hoc Work Group Committee
Tami Douglas-Schatz: referred to the staff report regarding the approved letter to the Board of Supervisors and neither Supervisor Gibson or Supervisor Mecham were opposed to the disbandment of the Ad Hoc Committee.

Commissioner Tappan: commented and made motion to disband the Ad Hoc Work Group Committee.

Commissioner Chapman: seconded; the motion carried 4-0-1.

5. **Job Class Job specifications – Revision (Action)**
President Nix: confirmed with Ms. Douglas-Schatz that item 5 will go after item 6 due to request from HR Analyst Ken Tasseff. After item 6 was approved as revised, the Commission adjourned for a 10 minute break at 9:50 a.m. Upon reconvening, HR Analyst Aide Emily Dabner-Rutter addressed the Commission regarding item 5.

a. *Administrative Services Manager*
HR Analyst Emily Dabner-Rutter described the revisions to the job specification and answered questions of the Commission.

President Nix: opened public comment after the Commission commented, being no further requests to speak, she closed the public comment period.

Commissioner Bergman: made a motion to approve the Administrative Services Manager job specification as revised.

Commissioner Tappan: seconded; the motion carried 4-0-1.

b. *Assessment Manager*
HR Analyst Emily Dabner-Rutter referred to replacement packet (*Attachment 1), introduced members of the Assessor's Department and described the revisions to the job specification and answered questions of the Commission.

Tami Douglas-Schatz: commented.

President Nix: opened public comment after the Commission commented, being no further requests to speak, she closed the public comment period.

Commissioner Tappan: made a motion to approve the Assessment Manager job specification as written.

Commissioner Bergman: seconded; the motion carried 4-0-1.

c. *Social Worker I, II, III, IV*
HR Analyst Emily Dabner-Rutter introduced Natalie Walter of the Department of Social Services and described the revisions to the job specification and answered questions of the Commission.

DRAFT

HR Director Tami Douglas-Schatz: commented.

HR Deputy Director Dori Duke: commented.

President Nix: opened public comment after the Commission commented.

General Manger SLOCEA Kimm Daniels: commented.

Natalie Walter: thanked Ms. Rutter for her heard work on the job specifications.

President Nix: being no further requests to speak, she closed the public comment period.

Commission Counsel Tim McNulty: commented.

Commissioner Bergman: moved to approve the Social Worker I, II, III, IV job specifications as amended.

Commissioner Tappan: seconded; the motion carried 4-0-1.

6. Job Class Specification – New (Action)

a. *Lead Health Education Job specification*

Personnel Analyst Ken Tasseff: introduced Kathleen Karle from the Health Agency and explained why the new job specification is needed.

President Nix: opened public comment after the Commission commented, being no father requests to speak, she closed the public comment period.

Commissioner Chapman: made a motion to approve the new job job specification as revised.

Commissioner Bergman: seconded; the motion carried 4-0-1.

7. Adjournment

Being no further business, President Nix adjourned the meeting at 11:04 A.M.

** Note: These minutes reflect official action of the Civil Service Commission. A digital record exists and will remain as the official, complete record of all proceedings by the Civil Service Commission.*

ATTACHMENT 1

Human Resources Department

Tami Douglas-Schatz, Director

SAN LUIS OBISPO COUNTY

County Government Center, 1055 Monterey Street • Ste. D-250, San Luis Obispo, CA 93408

• Telephone: 805.781.5959 • Fax: 805.781.1044 • Email: hr@co.slo.ca.us

TO: Civil Service Commission

DATE: November 28, 2012

FROM: Emily Dabner-Rutter, Personnel Analyst

SUBJECT: Revised Specification: Assessment Manager

RECOMMENDATION

It is recommended that the Commission approve the revised Assessment Manager class specification as proposed.

DISCUSSION

At the request of the Assessor's Office, the Human Resources Department is proposing revisions to the Assessment Manager class specification. This specification was last revised in April 2006.

The Assessor's Office is comprised of five divisions, each assigned to an Assessment Manager. Within each division are assigned sections, all of which were initially intended to have supervisory classifications reporting directly to their respective Assessment Managers. However, since 2006, various workforce changes (attrition, retirements, budget restrictions, etc.) have created significant classification gaps within the Department's organizational structure, and more specifically, have created gaps in the supervisory level. Currently, not all sections have supervisory positions, as was originally implied by the minimum qualifications of the Assessment Manager class specification.

As previously written, the minimum qualifications required applicants to have "three years of increasingly complex experience performing assessment duties, two years of which must be in a supervisory position." The Department has acknowledged the need to offer alternative options for applicants whose relevant experience would otherwise meet the requirements for the Assessment Manager position.

As proposed, there are now three ways in which applicants can meet the experience requirements:

> ***EITHER A:*** *Three years experience performing advanced journey level assessment duties within the various sections of the department, of which at least two years are in a supervisory position.* ***OR B:*** *Five years of experience performing advanced journey level assessment duties within the various sections of the department; up to two years of supervisory experience in any field can be substituted for the required experience on a year for year basis.* ***OR C:*** *Seven years of increasingly complex experience performing assessment duties, five years of which must be at the advanced journey level.*

The proposed revisions take into consideration the relevancy of experience performing advanced journey level assessment duties as it pertains to the knowledge, skills and abilities required as an Assessment Manager. Additionally, the proposed revisions allow for greater flexibility in substituting supervisory experience in any field, an option that was not previously included in the specification. The substitution caveat and alternative options proposed allow for a broader range of experience to be applied towards meeting the minimum qualifications for this classification.

As part of our ongoing Specification Update Program, various formatting changes have been included with the proposed revisions; no other substantive changes have been made to the specification. Please note that the educational requirements set forth in the minimum qualifications section will remain the same, no changes have been made at this time.

Attached are track changes for the aforementioned class specification, an organizational chart of the Assessor's Office is also attached.

The department has been involved in the development of this class specification and concurs with the specification as proposed.

HUMAN RESOURCES DEPARTMENT
San Luis Obispo County

ASSESSMENT MANAGER - ASSESSOR

DEFINITION:
Under direction, plans, organizes, controls, and directs the operations and activities of assigned division within the Assessor's Office; carries out the administrative and technical provisions of the Revenue and Taxation Codes and related State and County regulations; coordinates and directs processes, communications, resources, and personnel to meet County needs and assure effective, efficient, and timely assessment roll activities; supervises and evaluates the performance of assigned personnel; and does other related work as required.

REPRESENTATIVE DUTIES:
(Not in order of importance)

- Plans, organizes and directs the operations and activities of assigned division of the Assessor's Office; assures that property assessment programs, projects, and activities comply with established property taxation laws, codes, ordinances, regulations, policies, and procedures.

- Supervises and evaluates the performance of assigned personnel; interviews and selects employees; recommends transfers, promotions, reassignments, terminations, and disciplinary actions; coordinates subordinate work assignments and reviews work to assure compliance with established standards, requirements, and procedures; oversees the development and implementation of training functions.

- Establishes and maintains assessment roll processing timelines and priorities as assigned; estimates time, personnel, and resource requirements for assessment processes, operations, and activities; monitors progress of assessment workload and modifies activities to meet established objectives and timelines as appropriate; reviews completed projects to assure proper quality control.

- Monitors and evaluates division activities for effectiveness and operational efficiency; responds to staff and public input concerning division and functional needs and issues; assists in the development and implementation of new revenue and taxation laws, programs, policies and procedures to enhance effectiveness and operational efficiency of assessment processing and activities.

- Provides informational materials to Department and other County personnel, outside agencies, contractors, realtors, lawyers, title companies, and the public concerning division operations and activities; responds to inquiries, provides detailed and technical information concerning related laws, codes,

ordinances, regulations, policies, and procedures.

- Directs and participates in the preparation and maintenance of a variety of narrative and statistical reports, records, and files related to assessment programs, financial activity, compliance, personnel, and assigned duties.

- Participates in the development and preparation of the annual department budget; analyzes and reviews budgetary and financial data; controls and authorizes expenditures in accordance with established limitations; participates with other Department managers in establishing and implementing Department programs, policies, procedures, goals and objectives.

- Directs the resolution of assessment reviews and issues related to property tax regulation; represents the County Assessor before the Assessment Appeals Boards; represents the Department at various groups, boards, commissions, and other functions as directed.

- Participates in and supervises the design, development and implementation of computer and other automated systems to enhance the efficiency of departmental activities as required.

EMPLOYMENT STANDARDS:

Knowledge of:

- Management of operations and activities of assigned division

- Revenue and Taxation Code, legislation, guidelines, and regulations related to the assessment of property for ad valorem tax purposes

- Policies, practices, procedures, standards, and techniques involved in assuring County compliance with established assessment practices and legal mandates

- Budget preparation and control

- Principles and practices of administration, supervision, and training

- Effective oral and written communication skills

- Personal computer and mainframe computer applications related to the valuation of real and personal property

- Proficient public relations techniques

- Perform mathematical calculations

- Leadership and motivational techniques

Ability to:

- Support and follow departmental policies, goals, guiding principles, and Mission – Vision – Values Statement
- Plan, organize and direct the operations and activities of assigned division of the Assessor's Office
- Coordinate and direct communications, information, and personnel to meet County needs and assure effective and efficient division activities
- Supervise, train, and evaluate the performance of assigned personnel
- Interpret, apply, explain, and assure compliance with the technical and administrative provisions of property tax laws, codes, ordinances, regulations, policies, and procedures
- Collaborate and consult with others in the development and implementation of division programs, projects, polices, procedures, goals, and objectives
- Provide consultation concerning assessment practices/laws and implementation
- Oversee the investigation and assure proper and timely resolution of assessment reviews and appeals
- Communicate effectively both orally and in writing
- Establish and maintain cooperative and effective working relationships with others
- Operate a computer, assigned software and office equipment
- Prepare comprehensive narrative and statistical reports
- Perform mathematical calculations
- Develop and maintain positive working relationships; communicate and work effectively with others
- Foster a spirit of teamwork and support when interacting with staff and others
- Maintain a safe and orderly work area

EDUCATION AND EXPERIENCE:
Graduation from an accredited four-year college or university with a bachelor's degree in property appraisal, business or public administration, finance, accounting, economics, mathematics, computer science, structural or civil engineering, architecture, geographic studies, surveying, real estate or construction management, or a closely related field. (Job-related experience in the above fields or in a State Board of Equalization, or in a County Assessor's, Tax Collector's or Recorder's Office may substitute for the required education on a year-for-year basis.)

In addition, **EITHER A:** ~~t~~Three years ~~increasingly complex~~ experience performing advanced journey level assessment duties within the various sections of the department, of which ~~including~~ at least two years are in a supervisory position. **OR B:** Five years of experience performing advanced journey level assessment duties within the various sections of the department; up to two years of supervisory experience in any field can be substituted for the required experience on a year for year basis. **OR C:** Seven years of increasingly complex experience performing assessment duties, five years of which must be at the advanced journey level.

LICENSES/CERTIFICATES:
Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver's license will be required at the time of appointment and must be maintained throughout employment.

Possession of a valid Permanent Appraiser Certificate from the State Board of Equalization may be required within one year of employment and must be maintained throughout employment. This is in accordance with California Revenue and Taxation Code Property Tax Rules and the California State Board of Equalization Guidelines.

Additional certification may be required depending on assignment as necessitated by State law.

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential functions of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process. If you have any questions regarding the duties or the working conditions of the position, please contact the Personnel Department at (805) 781-5959.

192 _____~~CSC~~
193 ~~Approved~~Adopted: 04-27-2006
194 — — _____ Revised: 11-28-
195 2012
196
197 P:\SPECS\MASTER\A-B\ASSESSMENT MANAGER_08948.DOCX

DRAFT

Civil Service Commission

COUNTY GOVERNMENT CENTER ◆ 1055 MONTEREY STREET, SUITE D-250 ◆ SAN LUIS OBISPO, CALIFORNIA 93408 ◆ 805.781.5959

Civil Service Commission 2013 Regular Session Meeting Dates

MEMBERS OF THE COMMISSION
Jeannie Nix, President
Jay Salter, Vice President
William Tappan
Robert Bergman
Art Chapman

Regular monthly meetings are held on the 4th Wednesday at 9:00 A.M.

at 1055 Monterey Street, Suite D-271, San Luis Obispo.

January 23, 2013
February 27, 2013
March 27, 2013
April 24 2013
May 22, 2013
June 26, 2013
July 24, 2013
August 28, 2013
September 25, 2013
October 23, 2013
*November 20, 2013
*December 18, 2013

* Adjusted due to holiday

Note: If extenuating circumstances arise, following prior authorization from the Commission President and with compliance to the Brown Act, the meeting date / time / location may change.

3D(1)

HUMAN RESOURCES DEPARTMENT
San Luis Obispo County

ADMINISTRATIVE SERVICES MANAGER

DEFINITION:
Under general direction, assumes substantive and significant responsibility for departmental or division administration including fiscal and budgetary, personnel, management information systems, program and/or operational activities; coordinates, organizes and manages office and business activities and flow of communications and information to assure smooth and efficient business operations; supervises, trains and evaluates the performance of assigned personnel; and does other related work as required.

DISTINGUISHING CHARACTERISTICS:
Incumbents of this classification are typically assigned to the largest departments in size and budget to manage a major function of the overall department; or to medium-size departments with complex budgets to manage an administrative services division.

REPRESENTATIVE DUTIES:
(Not in order of importance)

- Performs and manages a variety of activities involved in the overall administrative, budgetary and personnel management of a designated County department; assists in establishing and maintaining departmental timelines and priorities; assures related activities comply with established standards, requirements, policies and procedures.

- Plans, coordinates and organizes office and business activities and flow of communications and information for effective and efficient business operations; assists in the development and implementation of department projects, contracts, goals, objectives, services and activities; assures proper and timely resolution of office, personnel and business issues, conflicts and discrepancies.

- Supervises, trains and evaluates the performance of assigned personnel; interviews and selects employees and recommends transfers, reassignments, terminations and disciplinary actions; oversees the development and maintenance of work performance and production standards for departmental operations.

- Coordinates and directs the development and preparation of the annual budget for the assigned department; reviews and analyzes budgetary and financial data; controls and authorizes expenditures in accordance with established limitations; organizes and directs fiscal operations and activities to meet the needs of assigned department; coordinates fiscal and accounting activities with financial and accounting-related personnel; recommends adequate resource and personnel levels to meet department needs; manages or serves as a liaison for automation activities.

- Monitors and assesses department programs, services and operations for financial effectiveness and operational efficiency; provides recommendations concerning the development and implementation of programs, policies and

procedures to enhance the financial effectiveness and operational efficiency of assigned department.

- Provides technical information and assistance to the assigned administrator concerning programs and operations, needs and issues; formulates and develops policies, procedures and programs; prepares and revises departmental policy and procedural manuals.

- Provides consultation to department staff concerning administrative activities of assigned department; responds to inquiries, resolves issues and conflicts and provides detailed and technical information concerning related standards, requirements, policies and procedures; communicates with departments, governmental agencies and others to exchange information, coordinate activities and resolve issues or concerns; attends and conducts meetings; prepares and delivers oral presentations concerning assigned programs and functions.

- Maintains current knowledge of laws, codes, rules, regulations and pending legislation related to department operations; provides input for proposed legislation and assists in the implementation of legislative changes; provides recommendations to ensure compliance with local, State and Federal requirements as necessary.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, and techniques involved in the administrative, budgetary and personnel management activities of a designated County department
- Principles of governmental accounting, financing and budgeting
- Automation applications and operations
- Basic contract preparation, negotiating and administration
- Applicable laws, codes, regulations, policies and procedures
- Research, analysis and evaluation techniques
- Budget preparation and control
- Operation of a variety of office equipment including a computer and assigned software
- Effective oral and written communication and interpersonal skills

Ability to:

- Support and follow departmental policies, goals, guiding principles, and Mission – Vision – Values Statement
- Perform a variety of activities involved in the overall administrative, budgetary and personnel management activities of a designated County department
- Coordinate and organize office and business activities and flow of communications and information to ensure effective and efficient outcomes
- Supervise, train and evaluate the performance of assigned staff
- Recommend adequate resource and personnel levels to meet department needs
- Evaluate administrative management problems and present appropriate corrective alternatives, solutions and recommendations
- Interpret, apply and explain laws, codes, rules, regulations, policies and procedures

- Establish and maintain, effective working relationships with others
- Operate a computer and assigned office equipment
- Plan and organize own work and work of others
- Develop and maintain positive working relationships; communicate and work effectively with others
- Foster a spirit of teamwork and support when interacting with staff and others
- Maintain a safe and orderly work area

EDUCATION AND EXPERIENCE: Graduation from an accredited four-year college or university with a bachelor's degree in business or public administration, accounting or a closely related field. (Job-related, professional-level experience may substitute for the required education, on a year-for-year basis.) In addition, three years of increasingly responsible professional-level experience involving work with a variety of administrative operations. One year of the required experience must have been in a supervisory position.

LICENSES AND OTHER REQUIREMENTS: A valid driver's license is required at the time of application. A valid CALIFORNIA driver's license is required at the time of appointment and must be maintained throughout employment.

SPECIAL SUBCLASS RECRUITMENT:
Recruitment for Administrative Services Manager positions may be conducted according to the special requirements for each position within the department where assigned.

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential duties of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process. This information will also be made available for review at the time of any recruitment for that position and at such other times as reasonably required.

Adopted: 4-28-04
BOS Approved: 6-22-04
Revised: 11-28-12

P:\SPECS\MASTER\A-B\ADMIN SERVICES MANAGER_08795.DOCX

HUMAN RESOURCES DEPARTMENT
San Luis Obispo County

ASSESSMENT MANAGER - ASSESSOR

DEFINITION:
Under direction, plans, organizes, controls, and directs the operations and activities of assigned division within the Assessor's Office; carries out the administrative and technical provisions of the Revenue and Taxation Codes and related State and County regulations; coordinates and directs processes, communications, resources, and personnel to meet County needs and assure effective, efficient, and timely assessment roll activities; supervises and evaluates the performance of assigned personnel; and does other related work as required.

REPRESENTATIVE DUTIES:
(Not in order of importance)

- Plans, organizes and directs the operations and activities of assigned division of the Assessor's Office; assures that property assessment programs, projects, and activities comply with established property taxation laws, codes, ordinances, regulations, policies, and procedures.

- Supervises and evaluates the performance of assigned personnel; interviews and selects employees; recommends transfers, promotions, reassignments, terminations, and disciplinary actions; coordinates subordinate work assignments and reviews work to assure compliance with established standards, requirements, and procedures; oversees the development and implementation of training functions.

- Establishes and maintains assessment roll processing timelines and priorities as assigned; estimates time, personnel, and resource requirements for assessment processes, operations, and activities; monitors progress of assessment workload and modifies activities to meet established objectives and timelines as appropriate; reviews completed projects to assure proper quality control.

- Monitors and evaluates division activities for effectiveness and operational efficiency; responds to staff and public input concerning division and functional needs and issues; assists in the development and implementation of new revenue and taxation laws, programs, policies and procedures to enhance effectiveness and operational efficiency of assessment processing and activities.

- Provides informational materials to Department and other County personnel, outside agencies, contractors, realtors, lawyers, title companies, and the public concerning division operations and activities; responds to inquiries, provides detailed and technical information concerning related laws, codes,

ordinances, regulations, policies, and procedures.

- Directs and participates in the preparation and maintenance of a variety of narrative and statistical reports, records, and files related to assessment programs, financial activity, compliance, personnel, and assigned duties.

- Participates in the development and preparation of the annual department budget; analyzes and reviews budgetary and financial data; controls and authorizes expenditures in accordance with established limitations; participates with other Department managers in establishing and implementing Department programs, policies, procedures, goals and objectives.

- Directs the resolution of assessment reviews and issues related to property tax regulation; represents the County Assessor before the Assessment Appeals Boards; represents the Department at various groups, boards, commissions, and other functions as directed.

- Participates in and supervises the design, development and implementation of computer and other automated systems to enhance the efficiency of departmental activities as required.

EMPLOYMENT STANDARDS:
Knowledge of:

- Management of operations and activities of assigned division

- Revenue and Taxation Code, legislation, guidelines, and regulations related to the assessment of property for ad valorem tax purposes

- Policies, practices, procedures, standards, and techniques involved in assuring County compliance with established assessment practices and legal mandates

- Budget preparation and control

- Principles and practices of administration, supervision, and training

- Effective oral and written communication skills

- Personal computer and mainframe computer applications related to the valuation of real and personal property

- Proficient public relations techniques

- Perform mathematical calculations

- Leadership and motivational techniques

Ability to:

- Support and follow departmental policies, goals, guiding principles, and Mission – Vision – Values Statement
- Plan, organize and direct the operations and activities of assigned division of the Assessor's Office
- Coordinate and direct communications, information, and personnel to meet County needs and assure effective and efficient division activities
- Supervise, train, and evaluate the performance of assigned personnel
- Interpret, apply, explain, and assure compliance with the technical and administrative provisions of property tax laws, codes, ordinances, regulations, policies, and procedures
- Collaborate and consult with others in the development and implementation of division programs, projects, polices, procedures, goals, and objectives
- Provide consultation concerning assessment practices/laws and implementation
- Oversee the investigation and assure proper and timely resolution of assessment reviews and appeals
- Communicate effectively both orally and in writing
- Establish and maintain cooperative and effective working relationships with others
- Operate a computer, assigned software and office equipment
- Prepare comprehensive narrative and statistical reports
- Perform mathematical calculations
- Develop and maintain positive working relationships; communicate and work effectively with others
- Foster a spirit of teamwork and support when interacting with staff and others
- Maintain a safe and orderly work area

EDUCATION AND EXPERIENCE:
Graduation from an accredited four-year college or university with a bachelor's degree in property appraisal, business or public administration, finance, accounting, economics, mathematics, computer science, structural or civil engineering, architecture, geographic studies, surveying, real estate or construction management, or a closely related field. (Job-related experience in the above fields or in a State Board of Equalization, or in a County Assessor's, Tax Collector's or Recorder's Office may substitute for the required education on a year-for-year basis.)

In addition, **EITHER A:** Three years experience performing advanced journey level assessment duties within the various sections of the department, of which at least two years are in a supervisory position. **OR B:** Five years of experience performing advanced journey level assessment duties within the various sections of the department; up to two years of supervisory experience in any field can be substituted for the required experience on a year for year basis. **OR C:** Seven years of increasingly complex experience performing assessment duties, five years of which must be at the advanced journey level.

LICENSES/CERTIFICATES:
Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver's license will be required at the time of appointment and must be maintained throughout employment.

Possession of a valid Permanent Appraiser Certificate from the State Board of Equalization may be required within one year of employment and must be maintained throughout employment. This is in accordance with California Revenue and Taxation Code Property Tax Rules and the California State Board of Equalization Guidelines.

Additional certification may be required depending on assignment as necessitated by State law.

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential functions of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process. If you have any questions regarding the duties or the working conditions of the position, please contact the Personnel Department at (805) 781-5959.

Adopted: 04-27-2006
Revised: 11-28-2012

P:\SPECS\MASTER\A-B\ASSESSMENT MANAGER_08948.DOCX

HUMAN RESOURCES DEPARTMENT
SAN LUIS OBISPO COUNTY

SOCIAL WORKER I, II, III, IV

DEFINITION:

Classes in this series determine the need for social services; approve and directly provide social services to persons eligible for public services or vocational assistance services; and perform other related work as required.

As appropriate, Social Worker positions are allocated to county departments other than the Department of Social Services.

DISTINGUISHING CHARACTERISTICS:

Social Worker I: This is the entry-level position in the series. Incumbents work under supervision while learning departmental organization, concepts of social service programs, basic case study methods, casework services, and related vocational services through the performance of the representative duties described below. In most cases, incumbents are expected to complete California Common Core training requirements and promote to Social Worker II after successful completion of twelve months of experience.

Social Worker II: This is the journey-level position in the series. Under general supervision, incumbents perform all functions of the Social Worker I classification with more independence, demonstrating increased knowledge and proficiency.

Social Worker III: This is the advanced journey-level position in the series. Under direction, incumbents perform all functions of the Social Worker II classification in addition to demonstrating skill in working with teams using community resources. Incumbents in this classification will train new social workers in day-to-day practices.

Social Worker IV: This is the highest level position in the series. Under direction, incumbents have considerable latitude for independent judgment and have experience in the areas of Child Welfare, Adult Services or In-Home Supportive Services. The Social Worker IV classification performs all functions of the Social Worker III classification, in addition to mentoring all Social Worker classifications in aligning their practice with the Department mission and goals, exhibiting leadership skills, and training staff as assigned. In some instances, State laws and regulations may require incumbents to possess specific graduate degrees to meet program requirements. May serve as lead worker or provide training or orientation to other employees.

REPRESENTATIVE DUTIES:

(Not in order of importance)

- Applies the principles and techniques of social work to a caseload composed of people who have various types of services problems, providing information to applicants, clients, other service providers and the public about eligibility for services and available alternate resources; makes home visits in connection with casework assignments.

- Interviews clients, family members and other interested parties to assess needs for social services; gathers and evaluates information regarding employment history, housing situation, physical functioning, financial status, capacity for independent living and availability of domestic services; evaluates clients' concerns and observes

behavior; develops service plans and establishes case files.

- Counsels clients and families on available community resources, barriers to employment, independent living skills and other areas involving defined problems or concerns; explains procedures, rights and responsibilities.

- Assists clients in identifying and obtaining basic services needed for independent living; identifies and makes referrals to a variety of public and community agencies providing food, shelter, clothing, medical, educational and other services; schedules client appointments; acts as client advocate in obtaining services.

- Manages assigned caseload; prepares and maintains narrative and statistical reports, documents and correspondence regarding client status; documents case files and case records; prepares and serves legal documents; testifies in court; uses automated office equipment and computer systems including Child Welfare System/Case Management System or Adult Services databases and other personal computer applications, including word processing.

- Assesses suitability of board and care facilities or foster homes; explains program requirements to potential licensees; reviews applications of licensees and interviews potential licensees; conducts on-site visits to assess living conditions.

- Develops and carries out Child Welfare or Adult Services treatment case plans, for voluntary or court-related assigned caseloads; evaluates family behavioral adjustment and monitors client progress toward delineated objectives; counsels clients using a variety of counseling modalities.

- May investigate reports of child or elder/dependent adult abuse, neglect and/or exploitation; assesses the degree of immediate risk to the child or elder/dependent adult and takes necessary action to minimize the risk; coordinates activity with other involved parties including relatives, school personnel and officers of the court.

- Interprets the policies, rules and regulations of the department to applicants, clients and others within the scope of his/her responsibility.

- Participates in staff development activities.

EMPLOYMENT STANDARDS:

Knowledge of:

All Levels:

- Socio-economic conditions and trends
- Basic principles of individual and group behavior
- Current issues in the field of social welfare
- Principles of interviewing and problem-solving methodology
- Automated office equipment
- Basic public social service programs on the Federal, State and local level
- Oral and written communication skills
- General principles of public assistance policies and programs

In addition, Social Worker II:

- Basic principles and techniques of interviewing and recording in social casework
- Laws, rules and regulations governing the operation of the public social service

agencies
- Vocational counseling and barriers to employment such as substance abuse or mental health issues
- Community organization and the social problems calling for the use of public and private community resources
- Basic principles involved in the nature, growth and development of personality and group processes

In addition, Social Worker III:
- Local socio-economic conditions
- Current problems and methodology in the field of public social service
- Principles related to family dynamics and dysfunction
- Principles of mentoring and training

In addition, Social Worker IV:
- Clinical implications of severe physical and mental health problems and their impact on child, adult and family functioning
- Principles of mentoring, training, leadership and work planning

Ability to:

All Levels:
- Support and follow departmental policies, goals, guiding principles, and Mission – Vision – Values Statement
- Act effectively and responsibly in stressful situations
- Obtain and recognize the relevant and significant facts
- Establish and maintain the confidence and cooperation of clients, co-workers and others from a variety of socio-economic and ethnic backgrounds
- Speak and write clearly and effectively
- Use automated office equipment
- Operate within appropriate confidentiality guidelines and within the National Association of Social Workers' Code of Ethics
- Interpret to the applicant, recipient or others, public social services programs, procedures and regulations
- Apply existing laws, rules and regulations to social service department operations
- Develop and maintain positive working relationships; communicate and work effectively with others
- Foster a spirit of teamwork and support when interacting with staff and others
- Maintain a safe and orderly work area

In addition, Social Worker II:
- Analyze situations and adopt effective courses of action
- Develop skill in facilitation of team-based meetings, case recording, interpretation, group presentations and motivating clients

In addition, Social Worker III:
- Increased skill in facilitation of team-based meetings, case recording, interpretation, group presentations and motivating clients
- Accept and use consultative supervision
- Effectively analyze and assess client needs and develop appropriate case plans
- Utilize effective and appropriate interventions to assist clients in achieving case plan goals
- Train and mentor other employees

In addition, Social Worker IV:

- Provide consultation, education and information services to community or professional groups and individuals
- Train, mentor, lead and coordinate work of other employees

EDUCATION/EXPERIENCE:

Social Worker I: Either A: Possession of a Bachelor's degree in Social Work **OR B:** Bachelor's degree in Psychology, Sociology, or a closely related Social Science **AND** one year job related experience in a public social services agency.

Social Worker II: Either A: Possession of a Bachelor's degree in Social Work **AND** one year of experience performing duties comparable to a Social Worker I in a public social services agency (One year of the required experience may be substituted with a related Master's degree); **OR B:** Bachelor's degree in Psychology, Sociology, or a closely related Social Science **AND** two years of experience performing duties comparable to a Social Worker I in a public social services agency (One year of the required experience may be substituted with a related Master's degree); **OR C:** Two years of experience as a Social Worker I in San Luis Obispo County.

Social Worker III: Either A: Possession of a Bachelor's degree in Social Work **AND** one year of experience performing duties comparable to a Social Worker II in a public social services agency (One year of the required experience may be substituted with a related Master's degree); **OR B:** Bachelor's degree in Psychology, Sociology, or a closely related Social Science **AND** two years of experience performing duties comparable to a Social Worker II in a public social services agency (One year of the required experience may be substituted with a related Master's degree); **OR C:** Two years of experience as a Social Worker II in San Luis Obispo County.

Social Worker IV: Either A: Possession of a Bachelor's degree in Social Work **AND** one year of experience performing duties comparable to a Social Worker III in a public social services agency (One year of the required experience may be substituted with a related Master's degree); **OR B:** Bachelor's degree in Psychology, Sociology, or a closely related Social Science **AND** two years of experience performing duties comparable to a Social Worker III in a public social services agency (One year of the required experience may be substituted with a related Master's degree); **OR C:** Two years of experience as a Social Worker III in San Luis Obispo County.

LICENSES/CERTIFICATES:

A valid driver's license is required at the time of application. A valid CALIFORNIA driver's license is required at the time of appointment and must be maintained throughout employment.

SPECIAL SUB-CLASS RECRUITMENT:

Recruitment for Social Worker positions may be conducted according to the program or department in which a vacancy exists and the special licensures/educational/experience requirements of the position.

Recruitment for these positions may be conducted to include bilingual ability according to the needs of the department.

OTHER CONDITIONS OF EMPLOYMENT:

Employees in this classification may be required to work holidays, weekends, and evenings.

Some travel may be required.

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential duties of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process. This information will also be made available for review at the time of any recruitment for that position and at such other times as reasonably required.

Adopted: 11-10-76
Revised: 07-24-02
Revised: 11-28-12

P:\SPECS\MASTER\S-ST\SOCIAL WORKER I-II-III-IV_01536.DOCX