

# Civil Service Commission

1055 MONTEREY STREET, SUITE D-250 ♦ SAN LUIS OBISPO, CALIFORNIA 93408 ♦ 805.781.5959

**San Luis Obispo County Civil Service Commission  
Regular Session Meeting  
Wednesday, June 25, 2014 @ 9:00 A.M.  
1055 Monterey Street, Suite D-271 San Luis Obispo, CA**



## AGENDA

MEMBERS OF THE COMMISSION  
President Arthur Chapman  
Vice President Wayne Caruthers  
Robert Bergman  
Betsey Nash, SPHR  
William Tappan

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 draft minutes are submitted for approval:
  - a. May 28, 2014 – Regular
4. **Job Class Specifications – Revised**
  - a. Supervising Property Transfer Technician
  - b. Assessment Technician Supervisor
5. **Reports**
  - a. Commission President
  - b. Commission Counsel
  - c. Commission Secretary
6. **Adjournment**

# Civil Service Commission

The San Luis Obispo County Civil Service Commission  
Regular Session Meeting  
Wednesday, May 28, 2014 @ 9:00 A.M.  
1055 Monterey Street, Suite D-271, San Luis Obispo, CA



MEMBERS OF THE COMMISSION  
Arthur Chapman, President  
Wayne Caruthers, Vice President  
Robert Bergman  
Betsey Nash, SPHR  
William Tappan

## MINUTES

Present: President Arthur Chapman, Vice President Wayne Caruthers, Commissioner Robert Bergman, Commissioner William Tappan, Commissioner Betsey Nash

Staff: Commission Secretary Tami Douglas-Schatz, Commission Clerks Heather Carey and Robin Mason

Counsel: Acting Commission Counsel Nina Negranti, Outside Legal Counsel, Steve Simas

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

President Chapman: Called the meeting to order at 9:00 A.M. and led the flag salute.

**2. Public Comment Period**

President Chapman: Addressed the audience asking for anyone wishing to speak to the Commission during the Public Comment Period on any matter that is not listed on today's agenda. Being no comment, President Chapman closed the Public Comment period.

**3. Minutes**

April 23, 2014 – Regular

President Chapman: Asked for corrections or changes. Being none, he requested a motion to approve.

Commissioner Nash: Made a motion to approve the April 23, 2014 minutes as written.

Commissioner Tappan: Seconded and stated that he likes the new format. The motion carried 4-0-1 (Commissioner Bergman abstained since he was absent from the April meeting.)

**4. Job Class Specifications – New**

**a. Building Division Supervisor**

Ms. Azarvand: Personnel Analyst Jamie Azarvand addressed the Commission and introduced the new specification as well as Assistant Planning Director, Kami Griffin and Chief Building Official Cheryl Journey.

# Civil Service Commission

Ms. Azarvand: She stated the reasons for the new specification and explained that the Department has been undergoing major reorganization and management wants to align the Building Division structure with the Planning structure. Department management wants to combine both into one efficient entity which would provide greater cross-training opportunities and career growth for employees within the Building Division.

Commissioner Nash: Asked if in the new configuration, a supervisor would be mandated to oversee a different division.

Ms. Griffin: Stated that a building supervisor would only be utilized in the building division, not in planning or operations divisions.

Commissioner Caruthers: Stated that it was a "good staff report, very logical," however he asked for assistance in interpreting the organization charts to see where the new specification would be placed.

Ms. Azarvand: Assisted Commissioner Caruthers and the other Commissioners with inquiries related to the organizational charts.

Commissioner Caruthers: Asked how many current employees could potentially be involved in the new classification.

Ms. Journey: Responded that 12 or so employees currently meet the minimum qualifications.

Commissioner Caruthers: Asked if there would be an increase or decrease in staff head count as a result of the new classification.

Ms. Journey: Answered that the head count would remain the same.

Commissioner Bergman: Asked if any current specifications would be deleted as a result of the new specification.

Ms. Journey: Replied that potentially three specifications could potentially be deleted as a result.

Commissioner Bergman: Asked specifically if the Assistant Building Official would be made obsolete.

Ms. Journey: Responded that she expects so after the current budget cycle.

Ms. Douglas-Schatz: Indicated that HR had internal discussions regarding making the appropriate specifications obsolete and that HR will bring these back to the Commission in the future.

# Civil Service Commission

- Commissioner Tappan: Expressed concern regarding whether or not employees will be given adequate time to obtain the appropriate licensure.
- Ms. Journey: Replied that they would be given adequate time.
- Commissioner Tappan: Asked whether SLOCEA was involved in the new specification process.
- Ms. Theresa Schultz, SLOCEA: Responded that they were and their concerns were addressed; they are in favor of the new specification.
- President Chapman: Asked if any thought had been given to combining the qualifications for Planning and Building specifications, granting the Department greater flexibility.
- Ms. Griffin: Indicated that this is not likely because both areas require very different specialty knowledge and skillsets.
- Commissioner Nash: Stated that she is a strong proponent of cross-training staff wherever possible.
- Commissioner Chapman: Stated that he thought the certification requirement verbiage was confusing and offered suggestions how the verbiage could be reworded.
- Ms. Azarvand: Agreed the language could be clarified as did Ms. Griffin. Ms. Azarvand offered to make the changes.
- President Chapman: Asked if there was any public comment regarding the new specification. Being none, he closed the Public Comment Period. He asked for a motion to approve the specification as amended.
- Commissioner Caruthers: Made a motion to approve the new job classification as amended.
- Commissioner Tappan: Seconded the motion. Motion carried 5-0-0.

## 5. Reports

### a. Commission President

- President Chapman: Stated that he would not be present at the June Regular meeting.
- Commissioner Nash: Stated that she would not be available for the June meeting either. The Commission determined that there will be a quorum so a June Regular meeting will still be possible.

### b. Commission Counsel

- Nina Negranti: No report.

# Civil Service Commission

**c. Commission Secretary**

Tami Douglas-Schatz:

Ms. Douglas-Schatz reported that the two dates HR had originally requested in May were vacated because the appeals were resolved. The Commission indicated they were pleased that the issues were resolved.

**6. Closed Session (per Government Code 54956.9) Conference with Legal Counsel-Existing Litigation: Sanchez vs. Civil Service Commission President Chapman: adjourned the meeting into Closed Session**

President Chapman: Being no further business, he asked if there was any Public Comment related to the Closed Session. Being none, he adjourned the meeting into Closed Session at 9:39 a.m.

President Chapman: Reconvened the meeting into Open Session at 10:18 a.m.

Ms. Negranti: Upon reconvening, Ms. Negranti indicated there were no reportable actions as a result of Closed Session.

**7. Adjournment**

President Chapman: Adjourned the meeting at 10:19 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.*



# Human Resources Department

## SAN LUIS OBISPO COUNTY

Tami Douglas-Schatz, Director

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](mailto:hr@co.slo.ca.us)

TO: Civil Service Commission

DATE: June 25, 2014

FROM: Mark McKibben, Personnel Analyst

SUBJECT: Revised Specification: Supervising Property Transfer Technician,  
Assessment Technician Supervisor

### **RECOMMENDATION**

It is recommended that the Commission approve the revised classification specifications as submitted.

### **DISCUSSION**

The County Assessor's Office is responsible for the valuation of real and personal property for tax assessment purposes. The Office has responded to the recent increase in staff turnover by filling vacant positions through both promotional and open recruitments. This increased hiring activity lead the Assessor's Management Action Team (AMAT) to review their succession planning efforts, which included a review of the Office's class specifications. In March 2014 the Commission approved updates to the Appraiser Trainee, I, II, III class series and the Supervising Appraiser classifications. Updates to the Property Transfer Technician I, II, III, IV class series were approved in April 2014. The updates proposed to the Supervising Property Transfer Technician and Assessment Technician Supervisor conclude the revisions planned to date.

As currently allocated, the Supervising Property Transfer Technician supervises 11 positions. The two Assessment Technician Supervisor positions supervise a total of 16 positions. The most significant changes to the specifications are in the minimum qualifications (MQ) sections. The revisions reflect the updates previously approved by the Commission to the respective subordinate classes and provide consistency between these two supervisory classes.

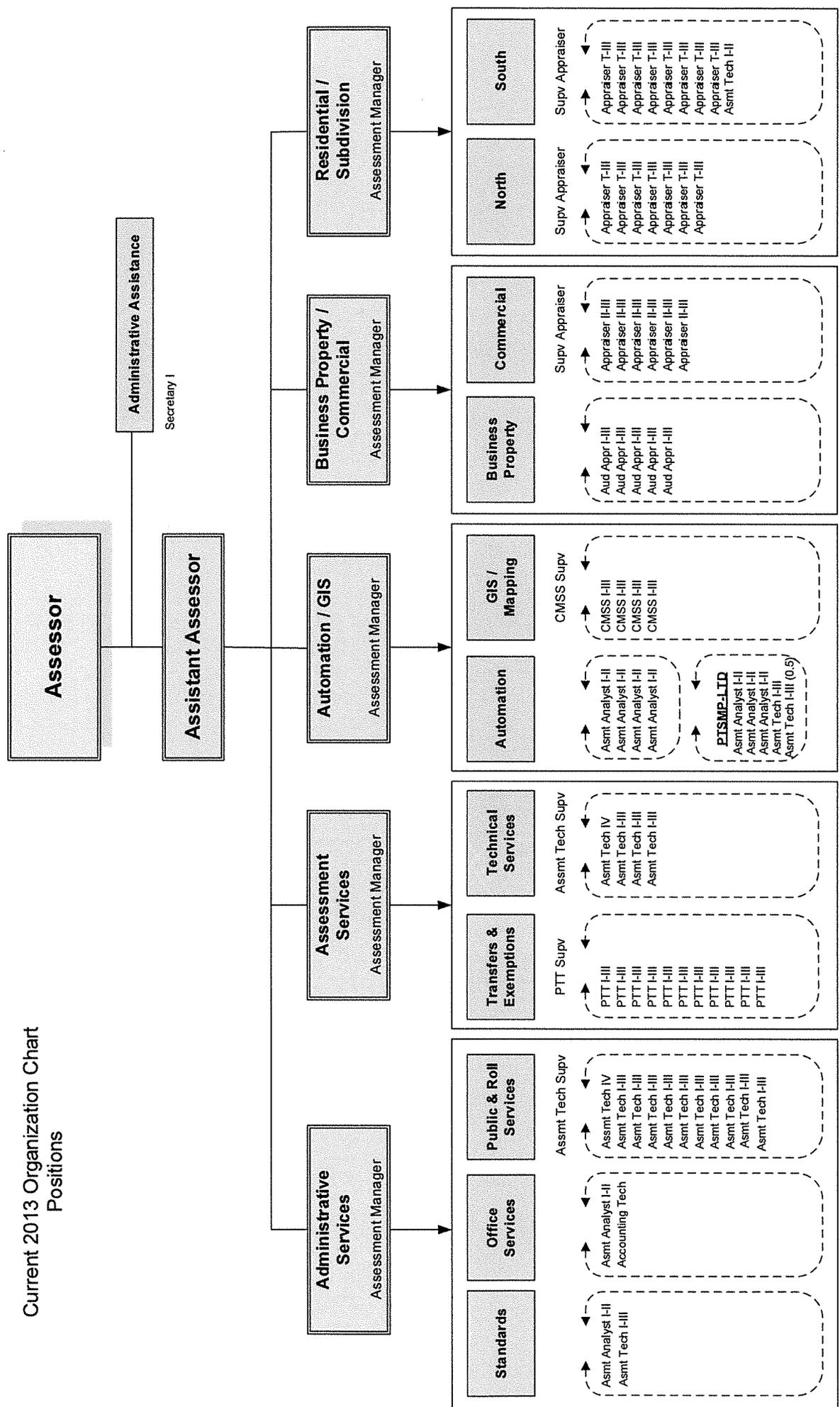
The Administrative Office, Human Resources, Assessor's Office and SLOCEA all support the changes as proposed.

#### Attachments:

- Assessor's Office Organizational Chart
- Supervising Property Transfer Technician I II III – track changes
- Supervising Property Transfer Technician I II III IV – final draft
- Assessment Technician Supervisor – track changes
- Assessment Technician Supervisor – final draft

4a-1

Current 2013 Organization Chart  
Positions



4a-2

1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

3

4 **SUPERVISING PROPERTY TRANSFER TECHNICIAN**

5

6

7 **DEFINITION:**

8

9 Under direction of the Assessment Manager, plans, directs, supervises, and evaluates  
10 the work of assigned staff in the performance or support of transferring/exempting  
11 real and personal property for tax assessment purposes; performs a variety of  
12 complex transfer/exemption duties; does other related duties as required.

13

14 **REPRESENTATIVE DUTIES:**

15 **(Not in order of importance)**

16

- 17 • Supervises, plans, directs, and evaluates the work of assigned staff; coordinates  
18 staff work assignments and reviews work to ensure compliance with established  
19 laws, policies, standards, and procedures; develops and implements training;  
20 mentors staff; recommends disciplinary action when appropriate.
- 21 • Personally performs or directly supervises the most complex property transfer and  
22 exemption activities, requiring a broad knowledge and the ability to interpret and  
23 apply the regulations, laws, policies, and procedures affecting exemptions and the  
24 transfer of property.
- 25 • Directs and/or participates in the development and implementation of programs,  
26 processes, and policies.
- 27 • Works with taxpayers and/or their agents to explain the basis of property changes  
28 in ownership and/or property exemptions.
- 29 • Prepares ~~or~~ and reviews pending revisions to assessment rolls.
- 30 • May direct and/or participate in the development of new systems to be used in  
31 transfer/exemption processes.
- 32 • May represent the Assessor at various meetings and speaking engagements.

- 33 • May present cases and appear as a witness in court or in equalization hearings
- 34 before the Assessment Appeals Board.
- 35 • Prepares a variety of reports and correspondence; reviews and approves
- 36 correspondence of assigned staff.
- 37 • May act for the Assessment Manager in his/her absence.
- 38 • Implements County safety programs and ensures employee compliance with all
- 39 safety rules and regulations; responds to hazard reports; investigates and reports
- 40 accidents and injuries.

41

42 **EMPLOYMENT STANDARDS:**

43 **Knowledge of:**

44

- 45 • Transfer and exemption principles, methods, policies, procedures, and
- 46 terminology pertinent to transferring/exempting real property for ad valorem
- 47 property taxation
- 48 • Provisions of the California State Constitution, Revenue and Taxation Code,
- 49 Probate Code, and other codes, ~~and~~ and regulations pertaining to the
- 50 assessment of property for ad valorem taxation purposes
- 51 • Common methods of describing real property
- 52 • Assessor's office organization, procedures and standards as well as strategic
- 53 direction and goals
- 54 • Principles of supervision, leadership and training
- 55 • Basic computer software including those applications pertinent to property
- 56 transfer and exemption functions
- 57 • Interpersonal skills using tact, patience, and courtesy
- 58 • Oral and written communication skills

59 **Ability to:**

- 60 • Plan, direct, supervise, and evaluate the work of assigned staff
- 61 • Perform complex transfer/exemption duties

- 62 • Independently analyze data and make proper determinations regarding
- 63 changes in ownership, exemptions, and exclusions
- 64 • Interpret, apply, and explain rules, laws, regulations, policies, and procedures
- 65 • Maintain and establish consistency of standards and procedures
- 66 • Analyze transfer/exemption problems, prepare sound recommendations, and
- 67 adopt effective courses of action
- 68 • Provide testimony and reports for court cases and for equalization hearings
- 69 before the Assessment Appeals Board
- 70 • Prepare concise and accurate written and oral reports and correspondence
- 71 • Convey clear directions and encourage communication with and among staff
- 72 • Embrace and follow Assessor's office policies, goals, guiding principles, and
- 73 Mission – Vision - Values Statement
- 74 • Develop, encourage, and maintain positive working relationships;
- 75 communicate and work effectively with others
- 76 • Motivate staff to achieve high performance
- 77 • Foster a spirit of teamwork and support when interacting with staff and others
- 78 • Operate a computer and assigned office equipment
- 79 • Maintain a safe and orderly work area
- 80 • Maintain the confidentiality of personnel records

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**EDUCATION/EXPERIENCE:**

~~*Either A:* An associate's degree or 60 semester units or 90 quarter units from an accredited college or university, and three years of increasingly complex experience performing the duties of a Property Transfer Technician in San Luis Obispo County or a comparable position. *Or B:* Four years of increasingly complex experience performing the duties of a Property Transfer Technician in San Luis Obispo County or a comparable position. One year of the above experience may be substituted with one year of experience as a Paralegal working with estate planning/administration, real property transactions, and/or corporate law.~~

92 Graduation from high school or possession of a G.E.D. certificate. In addition, EITHER  
93 A: One year of work experience as a Property Transfer Technician IV in San Luis  
94 Obispo County or equivalent position; OR B: Three years of work experience as a  
95 Property Transfer Technician III in San Luis Obispo County or equivalent position; OR  
96 C: Six (6) years of increasingly responsible experience in a closely related property  
97 tax field.

98

99 **LICENSES/CERTIFICATES:**

100 Certain positions within this classification may require driving. For these positions, a  
101 valid California driver's license will be required at the time of appointment.

102

103 Adopted: 6-23-04

104 BOS Approved: 7-13-04

105 Revised: 09-22-10

106 Revised 06-25-14

107

4a-6

1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

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4 **SUPERVISING PROPERTY TRANSFER TECHNICIAN**

5

6

7 **DEFINITION:**

8

9 Under direction of the Assessment Manager, plans, directs, supervises, and evaluates  
10 the work of assigned staff in the performance or support of transferring/exempting  
11 real and personal property for tax assessment purposes; performs a variety of  
12 complex transfer/exemption duties; does other related duties as required.

13

14 **REPRESENTATIVE DUTIES:**

15 **(Not in order of importance)**

16

- 17 • Supervises, plans, directs, and evaluates the work of assigned staff; coordinates  
18 staff work assignments and reviews work to ensure compliance with established  
19 laws, policies, standards, and procedures; develops and implements training;  
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23 apply the regulations, laws, policies, and procedures affecting exemptions and the  
24 transfer of property.
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26 processes, and policies.
- 27 • Works with taxpayers and/or their agents to explain the basis of property changes  
28 in ownership and/or property exemptions.
- 29 • Prepares and reviews pending revisions to assessment rolls.
- 30 • May direct and/or participate in the development of new systems to be used in  
31 transfer/exemption processes.
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- 39 safety rules and regulations; responds to hazard reports; investigates and reports
- 40 accidents and injuries.

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42 **EMPLOYMENT STANDARDS:**

43 **Knowledge of:**

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- 48 • Provisions of the California State Constitution, Revenue and Taxation Code,
- 49 Probate Code, and other codes, statutes and regulations pertaining to the
- 50 assessment of property for ad valorem taxation purposes
- 51 • Common methods of describing real property
- 52 • Assessor's office organization, procedures and standards as well as strategic
- 53 direction and goals
- 54 • Principles of supervision, leadership and training
- 55 • Basic computer software including those applications pertinent to property
- 56 transfer and exemption functions
- 57 • Interpersonal skills using tact, patience, and courtesy
- 58 • Oral and written communication skills

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- 73 Mission – Vision - Values Statement
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- 77 • Foster a spirit of teamwork and support when interacting with staff and others
- 78 • Operate a computer and assigned office equipment
- 79 • Maintain a safe and orderly work area
- 80 • Maintain the confidentiality of personnel records

81

82 **EDUCATION/EXPERIENCE:**

83

84 Graduation from high school or possession of a G.E.D. certificate. In addition, EITHER  
85 A: One year of work experience as a Property Transfer Technician IV in San Luis  
86 Obispo County or equivalent position; OR B: Three years of work experience as a  
87 Property Transfer Technician III in San Luis Obispo County or equivalent position; OR  
88 C: Six (6) years of increasingly responsible experience in a closely related property  
89 tax field.

90

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99

1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

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**ASSESSMENT TECHNICIAN SUPERVISOR**

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8 **DEFINITION:**

9

10 Under direction of the Assessment Manager, plans, directs, supervises, and evaluates the  
11 work of assigned staff in the performance or support of the preparation and maintenance  
12 of the assessment roll; performs a variety of complex assessment duties; and does other  
13 related work as required.

14

15 **REPRESENTATIVE DUTIES:**

16 **(Not in order of importance)**

17

- 18 • Supervises, plans, directs, and evaluates the work of assigned staff; coordinates staff  
19 work assignments and reviews work to ensure compliance with established laws,  
20 policies, standards, and procedures; develops and implements training; mentors  
21 staff; recommends disciplinary action when appropriate.
- 22 • Personally performs or directly supervises the most complex assessment enrollment  
23 duties.
- 24 • Directs and/or participates in the development and implementation of programs,  
25 processes, and policies; may direct and/or participate in the development of new  
26 systems to be used in assessment processes.
- 27 • Works with taxpayers and/or their agents to explain assessment practices and  
28 procedures.
- 29 • Prepares, reviews, and processes pending revisions to the assessment rolls.
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- 33 • May act for the Assessment Manager in his/her absence.
- 34 • Implements County safety programs and ensures employee compliance with all
- 35 safety rules and regulations; responds to hazard reports; investigates and reports
- 36 accidents and injuries.
- 37 • Coordinates activities with other sections within the Assessor's office and with other
- 38 government agencies regarding assessment procedures.

39

40 **EMPLOYMENT STANDARDS:**

41 **Knowledge of:**

- 42 • Assessment enrollment principles, methods, policies, procedures, and terminology
- 43 pertinent to assessment enrollment for ad valorem property taxation
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- 45 codes, ~~and~~ statutes and regulations pertaining to the assessment of property for ad
- 46 valorem taxation purposes
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75

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77 A: One year of work experience performing complex property tax assessment duties in a

78 position comparable to as an Assessment Technician IV in San Luis Obispo County or

79 equivalent position; OR B: Three years of work experience as an Assessment Technician

80 III in San Luis Obispo County or equivalent position; OR C: Six (6) years of increasingly

81 responsible experience in a closely related property tax field, two years of which must be

82 at a leadworker level.-

83

84 **LICENSES/CERTIFICATES:**

85

86 A valid driver's license is required at the time of application. A valid CALIFORNIA driver's

87 license is required at the time of appointment and must be maintained throughout

88 employment.

89

90 This class specification generally describes the duties and responsibilities characteristic

91 of the position(s) within this class. The duties of a particular position within a multi-

92 position class may vary from the duties of other positions within the class. Accordingly,

93 the essential duties of a particular position (whether it be a multi-position class or a

94 single-position class) will be identified and used by medical examiners and hiring

95 authorities in the selection process. This information will also be made available for

96 review at the time of any recruitment for that position and at such other times as  
97 reasonably required.

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99

Adopted: 4/29/98

100

Revised: 05/25/11

101

Revised: 06/25/14

1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

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**ASSESSMENT TECHNICIAN SUPERVISOR**

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- 67 • Develop, encourage, and maintain positive working relationships; communicate and
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75

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78 County or equivalent position; OR B: Three years of work experience as an Assessment  
79 Technician III in San Luis Obispo County or equivalent position; OR C: Six (6) years of  
80 increasingly responsible experience in a closely related property tax field.

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82 **LICENSES/CERTIFICATES:**

83

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

87

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

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Adopted: 4/29/98

Revised: 05/25/11

Revised: 06/25/14

46-8