AGENDA

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. June 27, 2018

4. Specifications- New
   a. Emergency Services Manager

5. Specifications- Revised
   a. Property Transfer Technician (PTT) series
   b. Property Transfer Technician (PTT) Supervisor

6. Minimum Qualifications Presentation

7. Reports
   Commission President
   Commission Counsel
   Commission Outside Counsel
   Commission Secretary

8. Adjournment
Civil Service Commission

San Luis Obispo County Civil Service Commission
Regular Session Meeting
Wednesday, June 27, 2018 @ 9:00 a.m.
1055 Monterey Street, Suite D-271 San Luis Obispo, CA

Present: President Bergman, Vice President Stewart, Commission Ohannesian, Commissioner Nix

Staff: Commission Secretary, Tami Douglas-Schatz
Commission Clerk, Rosa Reyes

Counsel: Commission Counsel Timothy McNulty

Absent: Commissioner Nicholson

1. Call to Order / Flag Salute / Roll Call
   President Bergman called the meeting to order at 9:01 a.m. and led the flag salute. Roll was called. Commissioner Nicholson was absent.

2. Public Comment Period
   President Bergman asked if there were any members of the public wishing to address the Commission. Seeing none he closed the public comment period.

3. Minutes
   President Bergman asked for any amendments or corrections to the May 23, 2018 and May 31, 2018 meeting minutes. None were reported. Commissioner Ohannesian made a motion to approve. Vice President Stewart seconded the motion. Motion passed 4-0-1.

4. Reports
   Tami Douglas-Schatz, Commission Secretary brought three matters before the Commission. She first introduced Kristin Eriksson, new Administrative Analyst assigned to Human Resources. She then advised the Commission there are no pending hearings. Lastly, the Minimum Qualifications Presentation will be delayed until September.

5. Closed Session (per Government Code Section 54957.6): Civil Service Rule Committee Discussion
   President Bergman moved the hearing into Closed Session for a discussion of the Civil Service Rule Committee.

3a.1
Civil Service Commission

6. **Recommendation to Approve Proposed Civil Service Rule Changes**
   President Bergman moved the Hearing back into Open Session. He advised there was no reportable action; however, a vote would be taken on the item. President Bergman stated the changes before the Commission had already been approved by the Unions, Civil Service Committee and then brought before the Commission in Closed Session. President Bergan inquired if there were any public comment on this item. There were none. Prior to voting on the matter, Commissioner Nix and Ohannesian thanked Human Resources staff. Commissioner Nix made a Motion to adopt the purposed Civil Service Rules changes as written. Commissioner Ohannesian seconded the motion. Matter went to a vote. Motion passed 4-0-1

7. **Adjournment**
   President Bergman adjourned the meeting.

*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.*
TO: Civil Service Commission

DATE: September 26, 2018

FROM: Mark Zeltmann, Human Resources Analyst

SUBJECT: New Specification: Emergency Services Manager
Department: Administration
Appointing Authority: Wade Horton, CAO

RECOMMENDATION:
It is recommended that the Commission approve the proposed Emergency Services Manager specification. The proposed specification would result in a new classification for an existing position currently classified as Principal Administrative Analyst.

BACKGROUND:
The County's emergency response preparation functions are currently led by a single Principal Administration Analyst position under the direction of the County Administrative Officer (CAO) and Assistant CAO. The current incumbent in that position has announced that he will retire in December 2018. The pending retirement provided an opportunity to review the job specification in advance of selecting a new leader for the function.

DISCUSSION:
The Principal Administrative Analyst specification does not adequately describe the position's purpose, essential functions, primary duties, or employment standards. As described in the current specification, the Principal Administrative Analyst “…organizes and directs operations and activities involved in the collection, analysis, interpretation and reporting of data related to County-wide policy planning and system implementation; oversees and participates in a variety of complex analytical studies of budgetary requirements, systems, procedures, policies, practices and techniques….”. Whereas the Principal Administrative Analyst is focused on analysis
and management of business administration functions, the Emergency Services Manager position is primarily responsible for planning, coordinating and directing an operational function and a discrete and specialized operational unit and staff. The emergency services management function is recognized as an established and common function managed by professionals with experience and education in a recognized profession and field of study. Other similar counties with comparable classifications include Kern, Monterey, Santa Barbara, Santa Cruz, Sonoma, and Ventura (6 of the 9 counties normally used for comparison with the County of San Luis Obispo). The proposed minimum qualifications are consistent with the requirements of comparable positions in these agencies.

The Principal Administrative Analyst specification does not accurately and adequately describe the purpose, essential functions, primary duties, and employment standards of the position. As such, it limits our ability to effectively to recruit qualified specialists and manage job performance, compensation, succession planning, and disability management.

PROPOSED DEPARTMENT STRUCTURE
The addition of the proposed Emergency Services Manager classification would not alter the department's current organizational structure or hierarchy. The position will continue to report to the CAO and Assistant CAO and will continue to supervise a staff of six made up of five Emergency Services Coordinators and one Emergency Services Technician.

RESULT
The addition of the proposed Emergency Services Manager specification will result in a document that accurately describes the purpose, essential functions, primary duties, and employment standards of the position. As such, the proposed specification will enable more effective recruitment, compensation management, performance management, succession planning, and disability management.

SUMMARY
In summary, the recommendation proposes to create a new Emergency Services Manager specification to accurately describe the duties of the existing emergency services manager currently classified as Principal Administrative Analyst.

OTHER AGENCY INVOLVEMENT:
The Administrative Office has been involved in creation of the proposed specification and concur with the specification as proposed.

Attachments:

1. Emergency Service Manager Class Specification
2. Administrative Office Organizational Chart
HUMAN RESOURCES DEPARTMENT
San Luis Obispo County

EMERGENCY SERVICES MANAGER

DEFINITION:
Under general direction, plans, organizes, manages and directs the personnel and functions of the County's Office of Emergency Services (OES); plans and coordinates the County's preparation, response, recovery and mitigation relating to hazards, emergencies and disasters.

DISTINGUISHING CHARACTERISTICS:
This single position management classification, reporting to County Administrative Officer or their designee, is responsible for planning, developing, and coordinating the operations of the OES and its county-wide emergency preparedness programs. The duties and responsibilities require a high degree of initiative and diplomacy, as well as advanced administrative, planning, and communication skills.

REPRESENTATIVE DUTIES:
(Not in order of importance)
- Leads the development of the County's emergency management objectives and priorities; develops policies, plans, and procedures to achieve objectives; develops OES performance measures
- Directs and coordinates preparation and maintenance of response, recovery and mitigation plans for emergencies and hazards such as earthquakes, tsunamis, fires, radiologic or hazardous materials, nuclear power plant accidents, transportation accidents, floods or landslides
- Develops interagency relations and coordinates interagency planning with local, state, federal, private, and volunteer organizations and agencies with emergency response roles.
- Coordinates and manages emergency operations during significant incidents or proclaimed disasters under the direction of the County Administrative Officer (Emergency Services Director), or designee; works closely with designated Incident Commanders and assists with the operations and administration of the EOC.
- Regularly evaluates OES performance against established performance measures and objectives
- Provides technical expertise to County departments and Operational Area jurisdictions related to implementation of disaster response and recovery plans.
- Ensures emergency facility readiness at locations including the Emergency Operations Center (EOC) and Joint Information Center (JIC); oversees regular equipment testing and upgrades, and procedure maintenance.
- Ensures compliance with National Incident Management System (NIMS) and Standardized Emergency Management System (SEMS) requirements.
- Oversees management and operation of public alert and notification systems, the Emergency Alert System, Wireless Emergency Alert, reverse telephonic notification systems, and Early Warning System sirens.
- Ensures maintenance and updates of OES website and social media outlets.
- Prepares and maintains OES related budgets; administers financial documents and procedures including claims, invoices, expense/revenue tracking and reporting.
- Manages public education and information activities related to emergency services; provides education and information where appropriate; prepares and presents oral and written reports to officials, press, employees, and community groups
- Plans and executes administrative projects including database management, procurement, call-out lists, and internal procedures.
- Responds to actual emergencies during EOC activations or as otherwise needed.
- Serves in rotation as OES on-call duty officer.

**Duties specific to Diablo Canyon Power Plant:**
- Ensures Nuclear Power Plant regulatory compliance through ongoing planning, training, exercising, reporting, and evaluation of emergency services plans and procedures.
- Manages radiological equipment testing, inventorying, and deployment.
- Conducts annual emergency worker radiological response training.
- Monitors the fleet of decontamination supply trailers; ensures maintenance and proper inventory to meet federal nuclear power plant regulations and ensure readiness.
• Oversees operation of dose assessment and plume modeling software and data collection systems.
• Plans, prepares and participates in FEMA Evaluated Nuclear Power Plant exercises and other ongoing drills.
• Performs related duties as required.

EMPLOYMENT STANDARDS:

Knowledge of:
• Principles and practices of current emergency planning, training and management
• Principles of terrorism response and planning
• Principles and practices of emergency management to include the Emergency Services Act (Chapter 7 of Division 1 of Title 2 of the Government Code) and the National Incident Management System (NIMS)
• Policies and procedures pertaining to emergency management
• Principles and practices of work safety
• Local County and governmental organization, legislative procedures, legal practices and applicable laws, codes, regulations, policies and procedures
• Project management and contract administration
• Budgeting practices regarding monitoring and control
• Current organizational practices and theories
• Oral and written communication skills
• Applicable laws, codes, regulations, policies and procedures
• Principles and practices of supervision and training
• Interpersonal skills using tact, patience and courtesy
• Modern office procedures, and computer software and equipment applications

Ability to:
• Organize, direct and implement a comprehensive countywide emergency services program involving County departments and staff, member agencies, volunteer groups, businesses, and community service organizations
• Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals
• Exercise independent judgement and initiative in solving difficult administrative, technical, and personnel problems or issues
• Act quickly and calmly in emergency situations; be effective in a fast-paced emergency environment; and make appropriate and timely decisions
• Keep informed of new technology, trends, techniques, laws and regulations relating to emergency services management
• Analyze and interpret budget, staff, and technical reports
• Develop, interpret, apply, and explain policies and procedures
• Monitor, evaluate and provide recommendations regarding program enhancement and modification
• Serve as liaison to County personnel and outside agencies regarding Emergency Services related issues
• Diagnose organizational problems and participate in the development of solutions to increase efficiency and productivity
• Prepare and administer a budget
• Supervise, train and evaluate personnel engaged in diverse technical and administrative programs and activities
• Work unusual or prolonged hours during emergencies or disasters and during training programs or preparedness exercises
• Gain cooperation through discussion and persuasion
• Work with various cultural and ethnic groups in a tactful and effective manner
• Establish and maintain effective working relationships with those contacted in the course of work.
• Communicate clearly and concisely, both verbally and in writing, including presenting findings and information to officials, press, employees, and community groups
• Operate standard office equipment including a computer and assigned software
EDUCATION AND EXPERIENCE:
Graduation from an accredited four-year college or university with a bachelor's degree in public safety administration, emergency management, business administration, public administration, or a related field. (Job-related experience may substitute for the required education on a year-for-year basis.) In addition, four years of broad, extensive, and increasingly responsible experience in emergency preparedness planning, management and administration or a closely related field.

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.

Completion of Federal Emergency Management Institute (FEMA) Professional Development Series must be obtained within six (6) months of appointment.

Possession of a California Specialized Training Institute (CSTI) Emergency Management Specialist certificate or an International Association of Emergency Managers (IAEM) Certified Emergency Manager (CEM) or Associated Emergency Manager (AEM) certificate is desirable.

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.
TO: Civil Service Commission
DATE: September 26, 2018
FROM: Mark Zeltmann, Human Resources Analyst
SUBJECT: Revised Class Specifications: Property Transfer Tech I-II-III-IV
Department: Assessor’s Office
Appointing Authority: Tom Bordonaro, County Assessor

RECOMMENDATION:
It is recommended that the Commission approve revisions to the Property Transfer Tech I-II-III-IV and Supervising Property Transfer Technician specifications as proposed.

BACKGROUND:
Existing law provides for the annual assessment and collection of property taxes by each county and provides for the administration of property taxes by the State Board of Equalization.

On April 12, 2016, the Board of Supervisors approved Resolution No. 2016-91 (attached) to adopt Section 674 of the Revenue and Taxation Code requiring State Board of Equalization certification for county employees who make decisions regarding changes in ownership or property tax exemptions. The required certification is referred to as “assessment analyst certificate”. In the County of San Luis Obispo, decision making regarding changes in ownership and property tax is an essential function of the Property Transfer Tech I-II-III-IV (PTT) and Supervising Property Transfer Technician (Supervising PTT). As such, it is necessary to revise the minimum qualifications to ensure compliance with Revenue and Tax Code.

DISCUSSION:
County assessors are required to follow complex state laws in the performance of their duties. The application of those laws is intended to provide consistent and accurate
assessment practices across the state. The intent of the law and the resulting certification requirement is to protect the interests of taxpayers by ensuring that decisions regarding eligibility of a property for exemption, or whether a transaction is a change in ownership or qualifies for an exclusion from a change in ownership, are made by staff who are qualified to make such decisions.

PROPOSED CLASS SPECIFICATION REVISIONS
The proposed PTT and Supervising PTT class specifications are revised to include an assessment analyst certificate in the License and Certificate requirements sections of the Employment Standards. For PTT II-IV and the Supervising PTT, certification is required at the time of appointment. For PTT I, certification may be obtained within one year of appointment to allow for the recruitment or transfer of external and internal candidates who have not received an assessment analyst certificate. For all levels of both classes, certification must be maintained throughout employment. As of the date of this memo, all incumbents in both classes have an active and unrestricted certificate.

Revisions to the proposed class specifications also include several minor revisions to update terminology or clarify meaning.

Lastly, a Distinguishing Characteristic section is added to the Supervising PTT to indicate its level in the department hierarchy.

RESULT
The proposed revisions increase the required qualifications of the PTT and Supervising PTT classifications to the level required by the State Board of Equalization as described in Section 674 of the Revenue and Taxation Code which requires county employees who make decisions regarding changes in ownership or property tax exemptions to have and maintain an assessment analyst certificate.

SUMMARY
In summary, the recommended revisions bring the classification specifications into compliance with Section 674 of the Revenue and Taxation Code. It also proposes to make several other minor revisions to clarify terminology and distinguishing characteristics.

OTHER AGENCY INVOLVEMENT:
The Assessor's Office and SLOCEA have been involved in the revisions of these specifications and concur with the specifications as proposed.

Attachments:

1. Property Transfer Tech class specification with proposed revisions
2. Property Transfer Tech Supervisor class specification with proposed revisions
3. Assessor's Office organizational chart
4. Resolution No. 2016-91
IN THE BOARD OF SUPERVISORS
COUNTY OF SAN LUIS OBISPO, STATE OF CALIFORNIA

Tuesday, April 12, 2016

PRESENT: Supervisors Frank R. Mecham, Bruce S. Gibson, Adam Hill, Debbie Arnold and Chairperson Lynn Compton

ABSENT: None

RESOLUTION NO. 2016-91
RESOLUTION ADOPTING SECTION 674 ET SEQ. OF THE REVENUE AND TAXATION CODE REQUIRING STATE BOARD OF EQUALIZATION CERTIFICATION FOR COUNTY EMPLOYEES WHO MAKE DECISIONS REGARDING CHANGES IN OWNERSHIP OR PROPERTY TAX EXEMPTIONS

WHEREAS, in 2015 the California Legislature passed, and the Governor approved, Assembly Bill 1534, adding Article 8.5 (commencing with Section 674) of Chapter 3 of Part 2 of Division 1 of the Revenue and Taxation Code; and

WHEREAS, Article 8.5 prohibits any person employed by the office of the county assessor from making decisions with regard to change in ownership and property tax exemptions, except a homeowner’s exemption claim, unless he or she is the holder of a valid assessment analyst certificate issued by the State Board of Equalization; and

WHEREAS, Article 8.5 does not apply to an assessor or any person employed by the office of the county assessor holding a valid appraiser’s or advanced appraiser’s certificate issued by the State Board of Equalization; and

WHEREAS, Article 8.5 shall only apply in counties that have passed a resolution upon the recommendation of the assessor to require certification as provided by Article 8.5; and

WHEREAS, change in ownership and property tax exemption decisions can have a profound effect on the county’s taxpayers and the county assessment roll; and

WHEREAS, making change in ownership and property tax exemption decisions requires knowledge of complicated laws, regulations, and court cases; and

WHEREAS, consistency, accuracy, and fairness in change in ownership and exemption decisions would benefit the county, residents of the county, and owners of property in the county; and
WHEREAS, it is in the best interest of the County of San Luis Obispo to require the certification as provided by Article 8.5 because the additional training and certification will promote consistent and accurate assessment practices within the county; and

WHEREAS, the San Luis Obispo County Assessor recommends that the Board of Supervisors pass a resolution requiring the certification as provided by Article 8.5;

NOW, THEREFORE, BE IT RESOLVED AND ORDERED, that the provisions of Article 8.5 (commencing with Section 674) of Chapter 3 of Part 2 of Division 1 of the Revenue and Taxation Code shall apply in San Luis Obispo County.

Upon motion of Supervisor Gibson, seconded by Supervisor Mecham, and on the following roll call vote, to wit:

AYES: Supervisors Gibson, Mecham, Hill, Arnold and Chairperson Compton
NOES: None
ABSENT: None
ABSTAINING: None

The foregoing resolution is hereby adopted.

Lynn Compton
Chairperson, Board of Supervisors

ATTEST:

TOMMY GONG
Clerk of the Board of Supervisors
By: Sandy Currens
Deputy Clerk

APPROVED AS TO FORM AND LEGAL EFFECT

RITA NEAL
County Counsel
By: /s/ Ann Duggan
Deputy County Counsel
Dated: March 30, 2016

STATE OF CALIFORNIA } ss.
COUNTY OF SAN LUIS OBISPO)

I, TOMMY GONG, County Clerk of the above entitled County, and Ex-Officio Clerk of the Board of Supervisors thereof, do hereby certify the foregoing to be a full, true and correct copy of an order entered in the minutes of said Board of Supervisors, and now remaining of record in my office.

Witness, my hand and seal of said Board of Supervisors on April 14, 2016.

TOMMY GONG,
County Clerk and Ex-Officio Clerk of the Board of Supervisors

By: Sandy Currens
Deputy Clerk
HUMAN RESOURCES DEPARTMENT
San Luis Obispo County

PROPERTY TRANSFER TECHNICIAN I, II, III, IV
(Career Series)

DEFINITION:
Under the direction of the section supervisor, performs a variety of duties in the transfer of property
ownership and/or exemptions for tax assessment purposes; and performs other related duties as required.

DISTINGUISHING CHARACTERISTICS:
Property Transfer Technician I is the entry level class in the series. Incumbents work under close
supervision while learning basic assessment/property transfer/exemption duties, policies, and
procedures.

Property Transfer Technician II is the journey level class in the series. Incumbents work under
supervision and perform progressively more difficult property transfer and/or exemption assignments.

Property Transfer Technician III is the advanced journey level class in the series. Incumbents work
under general supervision and perform complex property transfer and/or exemption duties; may assist
in providing training and technical work direction to more junior staff.

Property Transfer Technician IV is the advanced level class in the series. Incumbents work under
general supervision and perform the most complex property transfer and/or exemption duties; may
coordinate the work of and provide training and technical direction to more junior staff; may act as
specialist or section lead-worker.

REPRESENTATIVE DUTIES:
(Not in order of importance)

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• Reads and interprets documents relating to property transfers of title and/or exemptions, including trusts, court orders, and other legal documents.

• Utilizes/interprets appropriate State laws and codes to determine if a property transfer is to be reassessed and/or if an exemption is applicable.

• Works with attorneys, title companies, local organizations, and state and local agencies to resolve discrepancies for assessment, title and/or exemption purposes.

• Scans and indexes forms into the imaging workflow system.

• Processes assessment ownership information and/or exemption information using current formatting as defined by state guidelines, office policy, and procedures.

• Verifies accuracy of information entered on various assessment and/or exemption documents; takes action to correct inaccurate or incomplete data identified in various documents.

• Calculates assessment and/or exemption percentages.

• Enters, researches, processes and maintains a large volume of property assessment documents with a high degree of accuracy and independence.

• Correlates information from various sources to reach property transfer/exemption decisions.

• Assists/educates staff and the public about various assessment and/or exemption situations in person, by telephone, and through correspondence.

• Explains the application and interpretations of various Revenue and Taxation, Government, Civil, Probate codes, and related codes, statutes, and regulations to staff and the public.

• Reads and interprets legal descriptions on legal documents.

• Prepares a variety of reports and correspondence.

• May participate in the design, development, and implementation of systems, workflow, procedures, and/or policies to be used in the Assessor's office.

• May be called upon to assist, coordinate, or serve on special projects or teams.

• Performs other related duties as required or directed.

In addition to level I duties, the **Property Transfer Technician II**:

• Determines and may prepare corrections to assessment rolls past and present.

• May participate in field inspections of properties for assessment and exemption purposes.

In addition to level I and II duties, the **Property Transfer Technician III** performs some or all of the following duties:
May review pending revisions to assessment rolls prepared by more junior staff.

May train and mentor more junior transfer/exemption staff.

May review and approve correspondence of more junior staff.

May lead in the design, development, and implementation of systems and workflow to be used in the Assessor's office.

In addition to Level I, II, and III duties, the Property Transfer Technician IV performs some or all of the following duties:

- May present cases and appear as a witness in equalization hearings before the Assessment Appeals Board, or in court.
- May participate and/or lead in the development and implementation of policies to be used in the Assessor's office.
- May temporarily supervise the Transfer section of the Assessor's office in the absence of the supervisor or when directed.

EMPLOYMENT STANDARDS:

Knowledge of:

- Professional standards for verbal and written communication
- Interpersonal skills using tact, patience, and courtesy
- Provisions of the California State Constitution, Revenue and Taxation Code, Probate Code, and other codes regulations and statutes pertaining to the assessment of property for ad valorem taxation purposes
- Various methods and documents used to convey beneficial interest and/or title to real property
- Transfer and exemption principles, methods, procedures, and terminology pertinent to transferring/exempting real property for ad valorem property taxation
- Common methods of describing real property
- Legal descriptions, and mapping practices and procedures used in the Assessor's office
- Resources to resolve title discrepancies
- General office procedures, practices, and machine equipment
- Basic mathematics including fractions and percentages
- Basic personal computer usage and common software

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In addition:

**Property Transfer Technician II**
- Assessor's office organization, procedures, and standards as well as strategic direction and goals
- Computer applications pertinent to property transfer and exemption functions

**Property Transfer Technician III**
- Principles of leadership and training

**Property Transfer Technician IV**
- Accepted methods of employee training supervision and work planning

**Ability to:**
- Follow written and verbal instructions
- Accurately, tactfully, clearly, and concisely convey complex assessment laws and procedures both orally and in writing
- Analyze transfer and/or exemption problems, prepare sound recommendations, and execute effective courses of action
- Perform duties under pressure and with many interruptions while maintaining a balance between accuracy and quantity
- Use sound judgment in researching, interpreting, applying and explaining appropriate laws, codes, ordinances, regulations, policies, procedures, and guidelines
- Read and interpret maps and legal descriptions
- Embrace and follow Assessor's office policies, goals, guiding principles, and Mission - Vision - Values Statement
- 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
- Operate a computer and assigned office equipment
- Maintain a safe and orderly work area

In addition:
Property Transfer Technician II
- Determine and accurately prepare multiple types of roll collections
- Field inspect properties for exemption and assessment purposes

Property Transfer Technician III
- Train, mentor, and lead more junior staff
- Coordinate and oversee the work of others and communicate department needs to supervisors

EDUCATION AND EXPERIENCE:
- All levels: Graduation from high school or possession of a G.E.D. certificate.

In addition to the above:

Property Transfer Technician I:
- One year of experience in an Assessor's office, title company, estate planning office or similar business
- working with legal descriptions and/or legal documents related to real property transactions.

Property Transfer Technician II:
- Either A: One year of experience as a Property Transfer Technician I with San Luis Obispo County,
- Or B: Two years of experience performing duties comparable to a Property Transfer Technician I in an
  Assessor's Office;
- Or C: Three years as a Paralegal in estate planning/administration, corporate law office or similar
  business working with legal descriptions and/or legal documents related to real property transactions.

Property Transfer Technician III:
- Either A: Two years of experience as a Property Transfer Technician II with San Luis Obispo County.
- Or B: Three years of experience performing duties comparable to a Property Transfer Technician II in
  an Assessor's Office.

Property Transfer Technician IV:
Two years as a Property Transfer Technician III in San Luis Obispo County.

LICENSES AND 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.

Property Transfer Technician I:

An Assessment Analyst's Certificate issued by the California State Board of Equalization must be obtained within one year of appointment and maintained throughout employment.

Property Transfer Technician II, III, and IV:

An Assessment Analyst's Certificate issued by the California State Board of Equalization is required at the time of appointment and must be maintained throughout employment.

OTHER CONDITIONS OF EMPLOYMENT:

Progression from one level in this series to the next is at the discretion of the appointing authority and based on organizational need, achievement of minimum qualifications and the standards set forth for promotion within the department.

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 of the working conditions of the position, please contact the Human Resources Department at 805.781.5959.

Adopted: 10-31-90
BOS Approved: 12-20-90
Revised: 10-27-04
Revised: 09-22-10
SUPERVISING PROPERTY TRANSFER TECHNICIAN

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

DISTINGUISHING CHARACTERISTICS:
This is the first supervisory level in the Property Transfer Tech series. Incumbents receive direction from the Assessment Manager.

REPRESENTATIVE DUTIES:
(Not in order of importance)

- Supervises, plans, directs, and evaluates the work of assigned staff; coordinates staff work assignments and reviews work to ensure compliance with established laws, policies, standards, and procedures; develops and implements training; mentors staff; recommends disciplinary action when appropriate.

- Performs or directly supervises the most complex property transfer and exemption activities, requiring a broad knowledge and the ability to interpret and apply the regulations, laws, policies, and procedures affecting exemptions and the transfer of property.

- Directs and/or participates in the development and implementation of programs, processes, and policies.

- Explains the basis of property changes in ownership and/or property exemptions to taxpayers and/or their agents.

- Prepares and reviews pending revisions to assessment rolls.
• May direct and/or participate in the development of new systems to be used in
transfer/exemption processes.
• May represent the Assessor at various meetings and speaking engagements.
• May present cases and appear as a witness in court or in equalization hearings before the
  Assessment Appeals Board.
• Prepares a variety of reports and correspondence; reviews and approves correspondence of
  assigned staff.
• May act for the Assessment Manager in his/her absence.
• Implements County safety programs and ensures employee compliance with all safety rules
  and regulations; responds to hazard reports; investigates and reports accidents and injuries.
• Performs other related duties as required

EMPLOYMENT STANDARDS:

Knowledge of:
• Transfer and exemption principles, methods, policies, procedures, and terminology pertinent to
  transferring/exempting real property for ad valorem property taxation
• Provisions of the California State Constitution, Revenue and Taxation Code, Probate Code, and
  other codes, statutes and regulations pertaining to the assessment of property for ad valorem
  taxation purposes
• Common methods of describing real property
• Assessor’s office organization, procedures and standards as well as strategic direction and
  goals
• Principles of supervision, leadership and training
• Basic computer software, and software applications pertinent to property transfer and
  exemption functions
• Interpersonal skills using tact, patience, and courtesy
• Professional standards for verbal and written communication,

Ability to:
• Plan, direct, supervise, and evaluate the work of assigned staff
• Perform complex transfer/exemption duties
• Independently analyze data and make proper determinations regarding changes in ownership, exemptions, and exclusions
• Interpret, apply, and explain rules, laws, regulations, policies, and procedures
• Maintain and establish consistency of standards and procedures
• Analyze transfer/exemption problems, prepare sound recommendations, and adopt effective courses of action
• Provide testimony and reports for court cases and for equalization hearings before the Assessment Appeals Board
• Prepare concise and accurate written and oral reports and correspondence
• Convey clear directions and encourage communication with and among staff
• Embrace and follow Assessor’s office policies, goals, guiding principles, and Mission - Vision - Values Statement
• Develop, encourage, and maintain positive working relationships; communicate and work effectively with others
• Motivate staff to achieve high performance
• Foster a spirit of teamwork and support when interacting with staff and others
• Operate a computer and assigned office equipment
• Maintain a safe and orderly work area
• Maintain the confidentiality of personnel records

EDUCATION AND EXPERIENCE:

Graduation from high school or possession of a G.E.D. certificate.

In addition, Either A: One year of work experience as a Property Transfer Technician IV in San Luis Obispo County or equivalent position;

Or B: Three years of work experience as a Property Transfer Technician III in San Luis Obispo County or equivalent position;

Or C: Six (6) years of increasingly responsible experience in a closely related property tax field

LICENSES AND 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.
An Assessment Analyst's Certificate issued by the California State Board of Equalization is required at the time of appointment and must be maintained throughout employment.

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 Human Resources Department at 805.781.5959.

Adopted: 06-23-04
BOS Approved: 07-13-04
Revised: 09-22-10
Revised: 06-25-14
Assessor's Office
Fiscal Year 2018-19
Organizational Chart

Assessor

Assistant Assessor

Administrative Assistance
Assm Analyst Trainee
Assm Analyst I-II

Administrative Services
Assessment Manager

Assessment Services
Assessment Manager

Automation / GIS
Assessment Manager

Business Property / Commercial
Assessment Manager

Residential / Subdivision
Assessment Manager

Standards
Office Services
Public & Roll Services

Asst Analyst I-II
Asst Analyst I-III

PTT Supv
Asst Analyst Supv

PTT IV
PTT III
PTT II
Asst Analyst I-III
Asst Analyst I-II

SR GIS Analyst

Supv Appraiser
Supv Appraiser

Appraiser II-III
Appraiser T-III
Appraiser T-II
Appraiser I-III
Appraiser I-II
Appraiser I-I
Appraiser III
Appraiser IV
Appraiser V

Limited Term

Limited Term

North
South
To: Civil Service Commission
From: Tami Douglas-Schatz, Human Resources Director
Date: September 26, 2018
Subject: Minimum Qualifications & Selection Process

RECOMMENDATION
It is recommended that the Commission receive this presentation and authorize the application of a flexible approach to developing minimum qualifications that reflect best practices of merit-based selection processes.

DISCUSSION
In October 2017, HR staff presented the Commission with an overview on establishing minimum qualifications for job classes. The presentation, which can be found by clicking here and is included in the Commission’s agenda packet, included legal requirements, the County’s approach to developing minimum qualifications and their role in the selection process. HR Staff also committed to bring additional information to the Commission as best practices and policies evolve. Since minimum qualifications have been a frequent topic of discussion and debate, staff invested considerable time and effort to identify best practices in minimum qualifications and the selection process applied to recruitments, including:

1) Identifying concerns raised by the Commission in recent class specification presentations
2) Reviewing comparable specifications in similar public agencies
3) Reviewing information from HR professionals in similar agencies on the impact of broad MQ patterns
4) Reviewing the International City/County Management Association (ICMA) Talent 2.0 research report (research included input from County Administrators and Human Resources Directors state-wide)
5) Conducting an analysis of recruitments to identify the most effective approach to MQ's and selection

The retirement of baby boomers and demographic changes in the workforce require a more flexible and contemporary approach to our recruitment, selection, and onboarding of staff. An approach that borrows the best from the private sector while adhering to merit principles will improve the County’s ability to fill vacant positions with qualified employees. Having a qualified...
workforce is critical to the County’s ability to meet its obligation in servicing the citizens of our County.

RESULTS
The goal of the presentation is to inform the Commission on best practices and current trends, and to recommend that the Commission adopt a revision to the traditional MQ structure and apply the best practices identified from industry research and similar agencies. Adoption of the recommendation will enable the County to attract candidates with a diverse background of education and experience and apply our selection processes to identify the most qualified candidates.

Attachments:

- CSC presentation for September 26, 2018 meeting: *Minimum Qualifications & the Selection Process “Finding the Right Candidate”*
- CSC agenda packet from October 25, 2017 MQ presentation
- Cal-ICMA Talent 2.0 Report: A Modern Approach to Attracting and Retaining Top Talent in Local Government
- MQ Patterns – Project Manager & HR Analyst
- Class specifications – Project Manager & HR Analyst
- Best practices – related articles
- Sample Job Posting – attracting the right candidates
- County of San Luis Obispo performance evaluation core competencies
- Performance expectations and promotional guidelines for HR Analysts
TO: Civil Service Commissioners

FROM: Mark McKibben, Jamie Russell, Mark Zeltmann, Stephanie Price

DATE: September 14, 2018

SUBJECT: Binder for MQ Presentation: September 26, 2018 Civil Service Commission Meeting

Enclosed are materials for your review in preparation for the presentation on Minimum Qualifications. In order to facilitate the discussion, it is recommended that the Commission review the following materials prior to the September 26th meeting:

- CSC agenda packet for September 26, 2018 meeting
- CSC agenda packet from October 25, 2017 MQ presentation
- Executive Summary from the Cal-ICMA Talent 2.0 Report (pages I-III)

Also included in the binder for your reference are the following documents:

- CSC presentation for September 26, 2018 meeting: Minimum Qualifications & the Selection Process “Finding the Right Candidate”
- Full Cal-ICMA Talent 2.0 Report: A Modern Approach to Attracting and Retaining Top Talent in Local Government
- MQ Patterns – Project Manager & HR Analyst
- Class specifications – Project Manager & HR Analyst
- Best practices – related articles
- Sample Job Posting – attracting the right candidates
- County of San Luis Obispo performance evaluation core competencies
- Performance expectations and promotional guidelines for HR Analysts
Minimum Qualifications & the Selection Process:
Finding the Right Candidate

Background

- October 2017 presentation on setting minimum qualifications
  - Purpose, Legal Considerations, and SLO County approach

- Recent job spec presentations revealed a need for more discussion with the Commission
  - The role of minimum qualifications in the selection process
  - Our use of varied and more effective selection tools
**Background (continued)**

**Commission Concerns**

I. Are we “lowering the bar”?

II. How do we ensure applicants know how to qualify?

III. How do we establish performance expectations in the class specification?

---

**Today’s Agenda**

- Recruitment and Selection Process
  - Best Practices and Research Findings
  - Address Commission’s Concerns
- Elements of the Selection Process
- Options and Recommendation
- Q&A
Best Practices – History and Research

The Workforce is Changing

- Millennials make up 1/3 of the workforce
- Workforce is seeking meaning in their work and want to make a difference
- "Silver Tsunami" - Over 250,000 employees reach 65 each month
- By 2022, Talent development will need to be a top priority

Best Practices – History and Research

Cal-ICMA Talent Initiative

What was the purpose?

What were the key findings?

- Local government is not prepared
- More difficult to recruit from other agencies
- Typical government practice can turn away the best candidates
**Best Practices – History and Research**

**Recommendations**

- Broaden approach to qualifying candidates
- Focus on KSACs instead of MQ requirements
- Hire for potential, not just experience
- Become a learning organization
- Be flexible, update outdated rules and protocols
- Be more agile and emulate private sector practices

---

**Best Practices – Employment Standards**

**What Are Other Counties Doing?**

- 6 of 9 of our comparator counties allow various means for demonstrating required Knowledge, Skills, and Abilities (KSAs)
- Education and Experience guidelines or examples for how a candidate would typically acquire the required KSAs
Best Practices – Employment Standards

- Sonoma:
  Any combination of education, training, and experience which would likely provide the required knowledge and abilities listed. Normally, this would include:

- Monterey:
  Qualifications
  A combination of experience, education, and/or training which substantially demonstrates the following knowledge, skills and abilities:
  Examples Of Experience/Education/Training
  The knowledge, skills and abilities listed above may be acquired through various types of experience, education or training, typically:

Best Practices - Employment Standards

- Santa Barbara:
  A combination of training, education, and experience that is equivalent to the employment standard listed and that provides the required knowledge and abilities.

- Santa Cruz:
  Any combination of training and experience that would provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:
Best Practices - Employment Standards

Ventura:

Considerable experience performing construction project management which has led to the acquisition of the required knowledge, skills and abilities. The required knowledge, skills and abilities can also be obtained by completion of:

Placer:

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

Best Practices - Employment Standards

Santa Barbara

"The purpose was to recognize that there are potentially a variety of ways for applicants to demonstrate that they have the required knowledge skills and abilities (KSAs) that meeting the "typical education and experience standard" would demonstrate. The equivalent standard language acknowledges that, although there is one standard, absent something like a requirement for a specific degree or license or occupational certification, there may be a number of ways to meet that standard...I think it has been mutually beneficial for both applicants and hiring departments, because at times it broadens the applicant pool and gives qualified individuals opportunities to be considered for hire."

Ventura

"...its purpose is to provide flexibility in using professional judgment when screening applications. As you know, not everyone gets to the same place in their career using the same approach. To that regard there is flexibility in considering the education, skills, training, and overall experience against the KSAs by using the "can also be obtained..." phraseology."
Best Practices – Employment Standards

Related Articles

Hiring for Skills, Not Pedigree:
Why hiring managers should think twice about requiring a college degree
By Jennifer Arnold
NB Magazine, March 2018

Dismissed By Degrees
How degree inflation is undermining U.S. Competitiveness and hurting America's middle class
Filer, J., Hsu, H., et al. (October 2017), Dismissed By Degrees.
Published by Abt Associates, Grades of Life, Harvard Business School.

Competencies Hold the Key to Better Hiring
The key to better hiring may be to focus on competencies rather than credentials.
By Lee Michael Ito
SRM, January 28, 2015

Occupational Licensing and American Workers
Licensing plays an important role in determining workers' wages, unemployment, and mobility.
By Ryan Hurd

15 More Companies That No Longer Require a Degree – Apply Now
Increasingly, companies offer well-paying jobs to those with non-traditional education or a high-school diploma.
By Glassdoor Team
Glassdoor, August 14, 2016

SELECTION PROCESS
Ideal Candidate

What makes up the "Ideal candidate"?

Competencies
Values
Work Style
Knowledge
Work Experience
Skills
Education
Ability

Selection Process

Application Resume
Site Visits
Peer Interviews
Final Interviews
Application Screening
Performance Exams
Panel Interviews

Specific Language in Job Postings
Linked In & Professional Assoc.
Application Screening
Supplemental Questions
Knowledge (10%)
Additional (10%)
Fit
Minimum Requirements

Online Assessment
Performance Exams
Example: Administrative Services Manager

Minimum Qualifications:

- 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.

- *(Note: Accounting Unit requirement removed in 2012)*

Example: Administrative Services Manager

<table>
<thead>
<tr>
<th>Public Works (Finance)</th>
<th>DSS (Workforce Development Board Director)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supplemental Questions:</strong></td>
<td><strong>Targeted Job Posting:</strong> The ideal candidate will demonstrate thorough, in depth knowledge of the principles, methods, and procedures used in adult, youth, and displaced worker employment training; program design, planning, and management; and federal and state employment and training legislation and regulations—primarily WIOA.</td>
</tr>
<tr>
<td>1. Describe your experience in cost accounting</td>
<td></td>
</tr>
<tr>
<td>2. Are you a CPA or CPA Candidate?</td>
<td></td>
</tr>
<tr>
<td>3. Describe your experience with construction and project accounting/reporting</td>
<td></td>
</tr>
<tr>
<td>4. Describe your experience in SAP or other financial software</td>
<td></td>
</tr>
</tbody>
</table>
### Example: Administrative Services Manager

<table>
<thead>
<tr>
<th>Public Works (Finance)</th>
<th>DSS (Workforce Development Board Director)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Screening Criteria:</strong></td>
<td><strong>Screening Criteria:</strong></td>
</tr>
<tr>
<td>✓ Governmental/non-profit experience</td>
<td>✓ Based on answer to supplemental question:</td>
</tr>
<tr>
<td>✓ Cost Accounting experience</td>
<td>&quot;Please tell us about your experience in managing,</td>
</tr>
<tr>
<td>✓ Certified Public Accountant (CPA)</td>
<td>developing and administering workforce development</td>
</tr>
<tr>
<td>✓ Construction Project Experience</td>
<td>programs (particularly WA and WOA). Please provide</td>
</tr>
<tr>
<td>✓ Experience in SAP</td>
<td>examples of collaboration with community partners,</td>
</tr>
<tr>
<td></td>
<td>facilitation of board and/or committee meetings and</td>
</tr>
<tr>
<td></td>
<td>budget development.&quot;</td>
</tr>
<tr>
<td><strong>Panel Interviews:</strong></td>
<td><strong>Panel Interviews:</strong></td>
</tr>
<tr>
<td>✓ Initiative</td>
<td>✓ Work experience</td>
</tr>
<tr>
<td>✓ Critical Thinking</td>
<td>✓ Execution</td>
</tr>
<tr>
<td>✓ Knowledge Application</td>
<td>✓ Decisionalness</td>
</tr>
<tr>
<td>✓ Accountability</td>
<td>✓ Relationship Management</td>
</tr>
<tr>
<td>✓ Experience w/ governmental funds</td>
<td>✓ Leadership</td>
</tr>
<tr>
<td>✓ Presentations</td>
<td>✓ Strategic Risk Taking</td>
</tr>
</tbody>
</table>

#### Public Works (Finance)

<table>
<thead>
<tr>
<th>Educational Background</th>
<th>Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>NIA</td>
<td>1 yr - accountant - public sector</td>
</tr>
<tr>
<td>Masters - Public Administration</td>
<td>10 yrs - Financial Analyst - public sector</td>
</tr>
<tr>
<td>BS - Business Administration</td>
<td>10 yrs - accounting - public sector</td>
</tr>
<tr>
<td>BS - Business Administration</td>
<td>5 yrs - accounting - non-profit</td>
</tr>
<tr>
<td>BS - Business Administration</td>
<td>1 yr - accounting - public sector</td>
</tr>
<tr>
<td>Masters - Business Administration</td>
<td>5 yrs - accounting - private non-profit</td>
</tr>
<tr>
<td>Masters - Business Administration</td>
<td>3 yrs - budget analyst - public sector</td>
</tr>
<tr>
<td>BS - Accounting</td>
<td>4 yrs - accountant - non-profit</td>
</tr>
<tr>
<td>MA - Graphic Design</td>
<td>3 yrs - accountant - public sector</td>
</tr>
</tbody>
</table>

#### DSS (Workforce Development Board Director)

<table>
<thead>
<tr>
<th>Educational Background</th>
<th>Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Masters Social Work</td>
<td>5 yrs - WDA Program Manager - SLO &amp; DSS</td>
</tr>
<tr>
<td>Bachelor Communication Disorders</td>
<td>4 yrs - Program Manager - SLO &amp; DSS</td>
</tr>
<tr>
<td>Bachelor Business Administration</td>
<td>3 yrs - Social Worker - Social Service Administration Agency</td>
</tr>
<tr>
<td>Bachelor Business Administration</td>
<td>2 yrs - Program Manager - SLO &amp; DSS</td>
</tr>
<tr>
<td>Masters Public Administration</td>
<td>1 yr - Social Worker - Social Service Administration Agency</td>
</tr>
<tr>
<td>Bachelor Criminal Justice</td>
<td>3 yrs - Program Manager - SLO &amp; DSS</td>
</tr>
<tr>
<td>Bachelor Public Policy</td>
<td>4 yrs - Program Manager - SLO &amp; DSS</td>
</tr>
<tr>
<td>Bachelor Political Science - Behavioral Analysis</td>
<td>2 yrs - Program Manager - SLO &amp; DSS</td>
</tr>
<tr>
<td>Bachelor Leadership &amp; Management</td>
<td>15 yrs - Military experience, up to Commander</td>
</tr>
<tr>
<td>Bachelor Social Services</td>
<td>12 yrs - Program Manager &amp; Director - CAPSLO SLO County</td>
</tr>
<tr>
<td>Bachelor Liberal Arts &amp; Sciences</td>
<td>12 yrs - Program Manager - Mental Health Association</td>
</tr>
<tr>
<td>Bachelor Psychological Services</td>
<td>16 yrs - Program Manager - Mental Health Association</td>
</tr>
<tr>
<td>PhD Educational Leadership</td>
<td>3 yrs - Social Worker - private sector</td>
</tr>
<tr>
<td>Masters Social Work</td>
<td>3 yrs - Social Worker - non-profit</td>
</tr>
<tr>
<td>Bachelor Communication Disorders</td>
<td>5 yrs - Master's in Training Administration - CSS &amp; DSS</td>
</tr>
<tr>
<td>Bachelor Interdisciplinary Health &amp; Retail Science</td>
<td>15 yrs - Master's in Technology Applied to Health and Human Services</td>
</tr>
<tr>
<td>Bachelor Communication/English</td>
<td>15 yrs - Master's in Technology Applied to Health and Human Services</td>
</tr>
</tbody>
</table>
COMMISSION CONCERNS

Commission Concerns

I. Are we "lowering the bar"?

II. How do we ensure applicants know how to qualify?

III. How do we establish quality work performance in the class specification?
Commission Concerns

I. Are we “lowering the bar?”

- Our goal is to identify qualified candidates
- Recognize there are multiple paths for gaining the KSACs for a position
- Hire for potential and ability to learn vs. technical skills & knowledge
- Better tools available to determine best candidate

Examples of Success

Family Support Officer

Minimum Qualifications:

- Graduation from an accredited four-year college or university with a Bachelor's degree. (Job-related experience in a related field may be substituted for the required education on a year-for-year basis.)
### Examples of Success

#### Family Support Officer I Eligible List

<table>
<thead>
<tr>
<th>No.</th>
<th>Educational Background</th>
<th>Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BS Criminal Justice</td>
<td>4 yrs - Economic Support Specialist, public sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5 yrs - Income Maintenance Specialist, public sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9 yrs - Owner of Hair Salon, private sector</td>
</tr>
<tr>
<td>2</td>
<td>N/A</td>
<td>2 yrs - Correctional Monitor, non-profit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 yr - Child Support Officer, public sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 yrs - Lead for local documentation co., private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - manager, retail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - ES, public sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 yr - Sales rep, private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - Bank teller, private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - usher assistant, Church</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 yrs - IT, public sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 yr - Account Clerk, public sector</td>
</tr>
<tr>
<td>3</td>
<td>BA English</td>
<td>7 yrs - Human Services, public sector</td>
</tr>
<tr>
<td>4</td>
<td>N/A</td>
<td>6 yrs - Social Services</td>
</tr>
<tr>
<td>5</td>
<td>BS Business Administration</td>
<td>7 yrs - Human Services, public sector</td>
</tr>
<tr>
<td>6</td>
<td>N/A</td>
<td>6 yrs - Social Services</td>
</tr>
<tr>
<td>7</td>
<td>BS - Masters Education/ Counseling &amp; Guidance</td>
<td>6 yrs - Purchasing Technician, community college</td>
</tr>
<tr>
<td>8</td>
<td>BA - Women's Studies/Antropology</td>
<td>2 yrs - Coordinator, community college</td>
</tr>
<tr>
<td>9</td>
<td>BS Business Administration</td>
<td>3 yrs - Supervisor, non-profit recovery center</td>
</tr>
<tr>
<td>10</td>
<td>BA - Sociology</td>
<td>10 yrs - Director of Yoga Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 yr - Administrative Assistant, private practice</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - Hospitality Industry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - Office Manager, private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - Landscape, private sector</td>
</tr>
</tbody>
</table>

### Examples of Success

#### Project Manager I/II

**Minimum Qualifications:**

All levels: Graduation from an accredited college with a Bachelor of Science degree in Architecture, Civil Engineering, Construction Management, Business Administration, City & Regional Planning, Organizational Leadership or a related field. (Job-related experience may be substituted for the education requirement on a year-for-year basis.)

**In addition:**

Project Manager I: No experience required.

Project Manager II: Two (2) years of project management experience in building or infrastructure design and/or construction management, or work equivalent to Projects Manager I.
### Examples of Success

#### Project Manager I/II Eligible List

<table>
<thead>
<tr>
<th>No.</th>
<th>Educational Background</th>
<th>Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BA - History/Political Science</td>
<td>5 yrs - project manager - public sector</td>
</tr>
<tr>
<td></td>
<td>BA - Art</td>
<td>11 yrs - project manager - private sector</td>
</tr>
<tr>
<td></td>
<td>Masters - Architecture</td>
<td>9 yrs - project designer - private sector</td>
</tr>
<tr>
<td>2</td>
<td>BS - Chemistry</td>
<td>8 yrs - projectmgr/environmens specialist - private sector</td>
</tr>
<tr>
<td></td>
<td>Masters - Civil Engineering</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>AA - Business Administration</td>
<td>24 yrs - project management - private sector</td>
</tr>
<tr>
<td></td>
<td>BS - Industrial Technology</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Masters - Management</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>BS - Construction Management</td>
<td>6 yrs - project engineer - private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - purchasing &amp; contracts - private sector</td>
</tr>
<tr>
<td>5</td>
<td>BS - Business Administration</td>
<td>23 yrs - real estate/development</td>
</tr>
<tr>
<td>6</td>
<td>BS - Architecture</td>
<td>6 yrs project management - private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5 yrs - real estate - private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>11 yrs - project design</td>
</tr>
<tr>
<td>7</td>
<td>BS - Civil Engineering</td>
<td>12 yrs - project engineer - private sector</td>
</tr>
<tr>
<td>8</td>
<td>BS - Architecture</td>
<td>2 yrs - project manager - private sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 yrs - architectural intern</td>
</tr>
<tr>
<td>9</td>
<td>BS - Architecture</td>
<td>4 yrs - project manager - private sector</td>
</tr>
<tr>
<td>10</td>
<td>BS - Civil Engineering</td>
<td>4 yrs - project manager - public sector</td>
</tr>
<tr>
<td></td>
<td>Masters - Civil Engineering</td>
<td>1 yr - civil engineering assistant - public sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4 yrs - civil engineering intern - public sector</td>
</tr>
</tbody>
</table>

### Examples of Success

#### Diverse Qualifications

<table>
<thead>
<tr>
<th></th>
<th>Frank</th>
<th>Mark Z.</th>
<th>Taj</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>BS - History</td>
<td>Masters - Business Administration</td>
<td>Some college units</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BS - Law &amp; Society</td>
<td>Bachelor's degree in progress</td>
</tr>
<tr>
<td>Experience</td>
<td>2 years - HR Generalist -</td>
<td>14 years - Compensation &amp;</td>
<td>4 years - HR generalist college</td>
</tr>
<tr>
<td></td>
<td>community college</td>
<td>Benefits Manager - Hospitality Industry</td>
<td>10 years - Personnel Technician - City Government</td>
</tr>
<tr>
<td></td>
<td>1 year - HR Technician -</td>
<td></td>
<td>2 years - clerical - City government</td>
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<td></td>
<td>community college</td>
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<td>3 years - Reference Librarian -</td>
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<td></td>
<td>City public library</td>
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<tr>
<td>Certification</td>
<td>SHRM-CP</td>
<td>Certified Compensation</td>
<td>SHRM-SCP</td>
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<td></td>
<td>Professional (SCP)</td>
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Commission Concerns

I. Are we "lowering the bar?" (cont’d)

Education and experience are just a portion of the ideal candidate’s qualifications

Commission Concerns

II. How do we ensure applicants know how to qualify?

Sample Posting
Commission Concerns

III. How do we establish **performance expectations** in the class specification?

- Purpose of the Job Specification – describe the job duties and qualifications
- Performance Standards – define what a good job looks like and what constitutes a successful performer
- Performance Evaluation – compares employee’s performance to the standards
  - Exceptional Work Performance
  - Successful Work Performance
  - Needs Improvement

Talent Management Model

Source, Select, & Onboard

Develop

Exemplify

Retire

Excuse

Realign

Who are your superstars? Let them shine!
Continue providing high performers with the support and training they need to stay engaged and act as role models.

Can you get poor performers back on track through effective performance management practices?
**Countywide Competencies**

**Setting Performance Expectations**

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<td></td>
<td>Be open-minded to others’ ideas, willing to collaborate and be part of team even if they have the answer</td>
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<tr>
<td></td>
<td>Work cooperatively with others to achieve common goals</td>
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<td>Work cooperatively with others to achieve common goals</td>
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<td>Positively adjust style and efforts to complement those of others on the team</td>
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<td>Work closely with departments to gauge their needs</td>
<td>Work closely with departments to gauge their needs</td>
<td>Work closely with departments to gauge their needs</td>
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<td></td>
<td>Communicate consistently with Principal/Deputy - Have no reason to argue</td>
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<tr>
<td></td>
<td>Keep principal/deputy informed of progress and challenges that cannot be met</td>
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<td>Keep principal/deputy informed of progress and challenges that cannot be met</td>
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<td></td>
<td>Use logical reasoning to solve problems or accomplish a task</td>
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*COUNTY SAN LUIS CUSPO*
Ten Recommendations for Local Government Cal-ICMA Talent Initiative

☑ Conduct a simple workforce analysis (i.e., showing retirement risk now and in five years for different employee groups).
☐ Eliminate minimum qualifications for entry-level positions; hire for potential or learning agility.
☑ Enhance job announcements to showcase the meaning and purpose of the work, organizational values and culture, and opportunities to grow and develop.
☑ Fully utilize "stretch" assignments, including participation on cross-functional project teams.
☑ Train all supervisors and managers on how to coach and conduct development conversations with all direct reports.
☑ Ensure that supervisors and managers provide ongoing performance feedback to employees, not just a once-a-year performance evaluation.
☑ Conduct "stay interviews" with key talent (or better yet with all employees).
☑ Hire one or several university interns and limited-term Management Fellows (those graduating with master's degrees).
☑ Incorporate more flexibility into scheduling including, where appropriate, telecommuting.
☑ Ensure ongoing face-to-face interaction between employees and top management.

RECOMMENDATIONS
Summary & Options

- Our responsibility is to uphold the merit system in hiring
  - Ensure recruitments are a fair, competitive and that the best qualified candidates are made available for hire
- We must adapt to new realities in the labor market. Apply our selection processes, quicker process, more like private sector, but consistent with merit principles
- Applying multiple selection elements on the largest pool of candidates
- Options
  1. Do nothing, leave as is, status quo
  2. Broad MQ's - any four year degree or any related degree
  3. Follow ICMA recommendation - eliminate MQ's for entry-level positions
  4. Flexible MQ's "Any combination...”
     Maintain license/cert commensurate with the position as required by law or county preference

<table>
<thead>
<tr>
<th>Option</th>
<th>Pros</th>
<th>Cons</th>
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<tr>
<td>Do nothing, leave as is, status quo</td>
<td>• No additional work to change specs</td>
<td>• Unsustainable - will create critical staffing issues&lt;br&gt;• Legal Compliance</td>
</tr>
<tr>
<td>Broad MQ's - ex. any four year degree or any related degree</td>
<td>• Allows some additional candidates to compete</td>
<td>• Missing out on qualified candidates&lt;br&gt;• Legal Compliance&lt;br&gt;• Will become unsustainable - will create critical staffing issues</td>
</tr>
<tr>
<td>Follow ICMA recommendation - eliminate MQ's for entry-level positions</td>
<td>• In-line with report recommendation&lt;br&gt;• Allows all candidates to compete&lt;br&gt;• Supports &quot;grow your own&quot; culture&lt;br&gt;• Improve candidate pool for current and future vacancies</td>
<td>• Large pools of unqualified candidates (additional time needed for examination)</td>
</tr>
<tr>
<td>Flexible MQ's &quot;Any combination...” Maintain license/cert commensurate with the position as required by law or county preference</td>
<td>• Consistent with best practices&lt;br&gt;• Allows for broader pool of qualified candidates to compete&lt;br&gt;• Supports &quot;grow your own&quot; culture&lt;br&gt;• Improve candidate pool for current and future vacancies</td>
<td>• Potentially more difficult to respond to appeal&lt;br&gt;• Requires higher level of analysis</td>
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**Recommendation:**

- Authorize the application of a flexible approach to developing minimum qualifications that reflect best practices of merit-based selection processes

- Move focus from MQs to KSACs

- Use the selection process to focus on current and potential KSACs

- When legally required, education, experience, and certifications would remain “Required”

---

**Example**

**Analyst I-II-III**

**EDUCATION AND EXPERIENCE:**

Any combination of education, training, and experience which would likely provide the required knowledge and abilities listed. Normally, this would include:

- **Analyst I, II & III:** Graduation from an accredited four-year college or university with a degree in Public Administration, Business Administration or a closely related field. Job-related experience may substitute for the required education on a year-for-year basis.

- **Analyst I:** No additional experience required.

- **Analyst II:** In addition, one year of professional experience. (A post-graduate degree in one of the fields listed above may substitute for the required experience.)

- **Analyst III:** In addition, three years of professional experience. (A post-graduate degree in one of the fields listed above may substitute for one year of the required experience.)
**Example:**

**Analyst I-II-III**

**EDUCATION AND EXPERIENCE:**
Any combination of education, training, and experience which would likely provide the required knowledge and abilities listed. Typically, this would include:

- **Analyst I, II & III:** Graduation from an accredited four-year college or university with a degree in Public Administration, Business Administration or a closely related field.
- **Analyst II:** In addition, one year of professional experience.
- **Analyst III:** In addition, three years of professional experience.

**Next Steps if Adopted:**

- Apply a KSAC focused approach to existing specifications by accepting a more diverse combination of education and experience
- Identify those classifications that require, license or certification by law or statute
- Continue partnership with Employee Associations and Departments in the update process
- Report to CSC on progress