



## CIVIL SERVICE COMMISSION

Monday – July 11, 2016

CIVIL SERVICE COMMISSION  
RICK WARD, **Chair**  
ANDRAE RANDOLPH, **Vice Chair**  
JOHN COSTA  
RON LE DOUX  
DON NELSON

Lori Walsh, Director of Human Resources  
Dawn McCollum, Commission Clerk

### AGENDA

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Placer County is committed to ensuring that persons with disabilities are provided the resources to participate fully in its public meetings. If you are hearing impaired, we have listening devices available. If you require additional disability-related modifications or accommodations, including auxiliary aids or services, please contact the Executive Secretary. If requested, the agenda shall be provided in appropriate alternative formats to persons with disabilities. All requests must be in writing and must be received by the Executive Secretary five business days prior to the scheduled meeting for which you are requesting accommodation. Requests received after such time will be accommodated only if time permits.

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#### MEETING LOCATION:

**Placer County Human Resources Training Room**  
145 Fulweiler Avenue, Suite 200  
Auburn CA 95603  
530.889.4060

4:00 PM OPEN SESSION

Roll Call

Flag Salute

- I. **Agenda Approval**
- II. **Approval of Minutes from previous meeting - June 13, 2016**
- III. **Public Comment:** Persons may address the Commission on items not on this agenda. Please limit comments to 3 minutes per person since the time allocated for Public Comment is 15 minutes. If all comments cannot be heard within the 15-minute time limit, the Public Comment period will be taken up at the end of the regular session. The Commission is not permitted to take any action on items addressed under Public Comment.
- IV. **New Business**
  - A. Request for approval of Work out of Class Pay pursuant to Placer County Code Section 3.08.510 (C)(5)(c.) for employees assigned to the departments of Health and Human Services and the Auditor-Controller.
  - B. Request for approval to revise the job specification for the classification Victim Witness Supervisor.

- C. Request for approval to revise the job specification for the classification Library Clerk - Senior.
  - D. Request for approval to create the classification of Revenue Services Supervisor and to revise the job specifications for the classifications Collection Agent I/II, Collection Agent – Senior, and Revenue Services Manager.
- V. **COMMUNICATIONS** - Reports to the Commission are informational items only. **(No action will be taken)**
- A. Provisional Appointments – None
  - B. Commissioner Comments
  - C. Staff Reports and Correspondence
    - 1. Judy LaPorte - Staff Introduction: Sheri Chapman

#### **CLOSED SESSION**

##### **I. PUBLIC EMPLOYEE PERFORMANCE EVALUATIONS**

- A. Evaluation of performance of various Placer County employees pursuant to Government Code Section 54957 and pursuant to Placer County Chapter 3 Code Section 3.04.650.

#### **OPEN SESSION**

- I. Report of action taken in closed session pursuant to Government Code Section 54957.
- II. Approval of merit increases for classified employees pursuant to Section 3.04.650 (progression in steps) of the Placer County Code.
- III. Adjournment

#### **Civil Service Commission – Upcoming Meetings**

- July 25, 2016 – Rocklin  
Special Meeting – Department Update: Air Pollution Control District
- August 8, 2016 – Auburn  
Regular Meeting



PLACER COUNTY  
HUMAN RESOURCES DEPARTMENT  
145 Fulweiler Avenue, Suite 200  
Auburn, California 95603-4578

CIVIL SERVICE COMMISSION  
John Costa  
Ron Le Doux  
Don Nelson  
Andrae Randolph  
Rick Ward

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Lori Walsh, Human Resources Director  
Main Office: 530.889.4060  
FAX: 530.886.4626  
[www.placer.ca.gov](http://www.placer.ca.gov)

## MEMORANDUM

**TO:** Civil Service Commission  
**FROM:** Lori Walsh, Human Resources Director  
**BY:** Dawn McCollum, Commission Clerk  
**DATE:** July 11, 2016  
**SUBJECT:** Work Out of Class Pay

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We have received the following requests for work-out-of-class pay extensions. Listed below are the departments, employee names, and time periods requested. The Human Resources Department has previously approved work-out-of-class pay and we are requesting the Civil Service Commission approve extensions as per Placer County Code 3.08.510 C.5.c. Supporting documentation has been attached to this memo.

<u>Department</u>	<u>Employee Name</u>	<u>Dates</u>	<u>Approximately</u>
HHS/Administration	Margie Livingston	07/22/2016 – 01/20/2017	180 days
Auditor-Controller	Heidi Helm	08/04/2016 – 02/03/2017	180 days

**Recommendation:** It is recommended that the Civil Service Commission approve the above work-out-of-class pay extension(s) in recognition of the duties being performed.

**cc:** Jeff Brown – Health & Human Services  
Andrew Sisk – Auditor-Controller

JUN 10 2016

**WORK OUT OF CLASS AGREEMENT  
DEPARTMENT OF HEALTH AND HUMAN SERVICES**

**TO:** Lori Walsh, Human Resources Director  
**FROM:** Jeffrey S. Brown, Health and Human Services Director  
**DATE:** June 8, 2016  
**SUBJECT:** Request for Work Out of Class (WOC) Pay

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**ACTION REQUESTED**

Employee's Name: Margie Livingston  
Current Classification: Account Clerk - Senior  
WOC Classification: Collection Agent II  
Initial WOC Effective Date: January 23, 2016  
Requested Extension Effective Date: July 22, 2016  
Approximate Number of Days: 180 Days  
Approximate End Date (End of pp): January 20, 2017  
Reason for WOC Request:

- Fill Behind Leave of Absence     Peak Workload/Special Project     Pending Reclassification/Reallocation  
 Fill Behind Retirement     No Request to Fill Vacancy     Request to CEO to Fill Vacancy  
 Fill Behind WOC     Temporary End WOC>80-Hours Leave     Restart WOC>80-Hours Leave

**BACKGROUND**

Margie Livingston, Senior Account Clerk, in HHS Administration has agreed to continue performing the higher level duties of a Collection Agent II. This vacancy resulted from a retirement in November 2015. Ms. Livingston compiles and evaluates information required to collect delinquent accounts; makes initial determinations and recommendations of appropriate action in collections cases; obtains collections on delinquent accounts through correspondence, telephone communications and personal interviews; interviews clients to obtain information for completion of financial statements and other information to determine payment schedules on accounts owed; contacts businesses, neighbors, credit unions and other leads to trace and contact persons with delinquent accounts; completes data entry to the appropriate tracking systems; prepares statements of amounts due; prepares installment receipts; and maintains files and records related to accounts. This extension is requested pending the finalization of the Collection Agent series classification review. Upon completion of the classification review and availability of an eligible list, this vacancy will be filled via the competitive process.

**RECOMMENDATION**

It is therefore recommended that Margie Livingston, Account Clerk - Senior, be approved to receive WOC pay as a Collection Agent II effective January 23, 2016. This WOC assignment will result in an approximate increase of 5%. Consistent with the guidelines presented under provisions for work out of class section in Chapter 3 of the County code, additional compensation for working out of class shall be no less than a minimum of five percent or exceed a maximum of fifteen (15) percent. The specific amount of the additional compensation will be determined by an analysis of the employee's current classification and the proposed work out of class classification and in no case will exceed the amount the employee would receive if promoted.

**AUTHORITY**

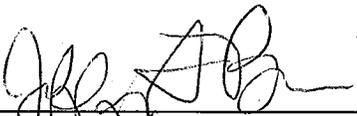
In line with the principle that an employee assigned to work in a position having discernibly higher job duties should receive higher pay, positions within the classified service may be applicable for work-out-of-class assignment. Individual employees may be certified by the personnel department as being eligible for work-out-of-class pay when so assigned by the appointing authority or designate of that appointing authority. (3.08.510)

**PROVISIONS FOR WOC ASSIGNMENTS**

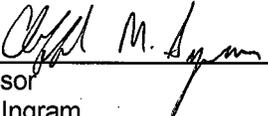
- For evaluation purposes, employee is rated on his or her current classification.
- Evaluation rating periods are not impacted by WOC assignments.

- Employee will continue to be eligible for merit increases as outlined in 3.04.650.
- Employee will continue to accrue seniority in his/her regular position/classification.
- Employee will continue to receive the benefit package associated with his/her regular position/classification.
- WOC compensation will not be considered or paid for assignments of two workdays or less or for training purposes.
- The Department must notify the Personnel Department when the WOC employee has a leave of absence that exceeds 10 ten working days since this results in ending WOC compensation. The Department must notify Personnel and submit the appropriate paperwork prior to continuing an employee in a WOC assignment upon his or her return from leave.
- Additional compensation for working out of class shall be no less than a minimum of five (5) percent or exceed a maximum of fifteen (15) percent.
- The Department is responsible for requesting WOC extensions anticipated to be beyond 180 days from the County Executive's Office using the Position Exception Form and process.
- Employee is not to begin the work out of class assignment until certified by the Personnel Department that the individual meets the minimum qualifications for the WOC assignment, the additional duties warrant WOC compensation, and that the WOC compensation requirements have been met.

*I have reviewed and understand the Department and Employee responsibilities with the requested WOC assignment and understand the provisions set forth above and specified in 3.08.510 of Placer County's Personnel Rules.*

  
 \_\_\_\_\_ 6/15/2016  
 Appointing Authority                      Date  
 Jeffrey S. Brown  
 Director  
 Health and Human Services

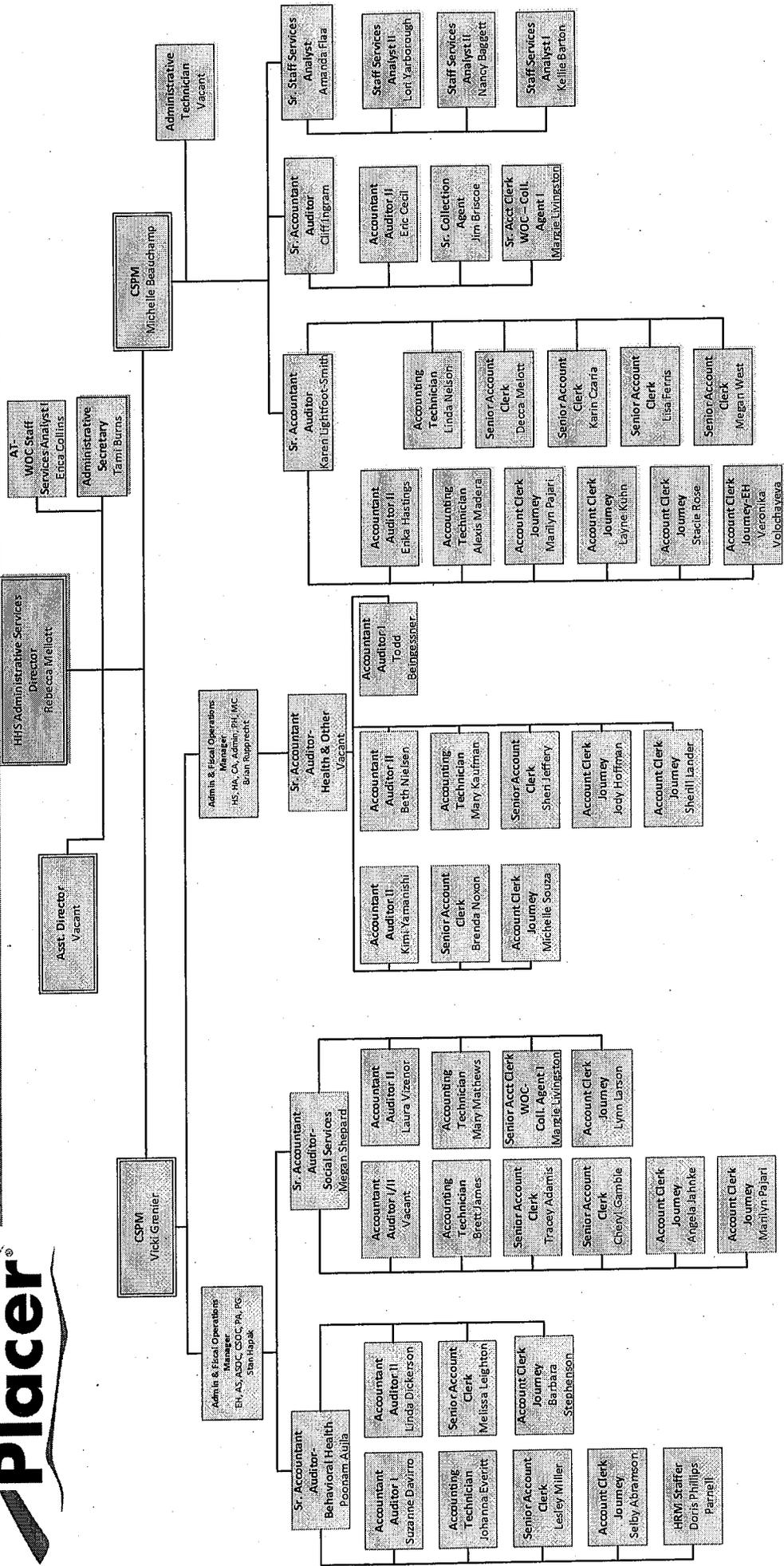
  
 \_\_\_\_\_ 6-21-16  
 Employee                                      Date  
 Margie Livingston  
 Account Clerk- Senior  
 Health and Human Services

  
 \_\_\_\_\_ 6/21/16  
 Supervisor                                  Date  
 Clifford Ingram  
 Senior Accountant Auditor  
 Health and Human Services



**HEALTH AND HUMAN SERVICES  
ADMINISTRATIVE SERVICES DIVISION**

**REBECCA MELLOTT  
DIVISION DIRECTOR**



**WORK OUT OF CLASS AGREEMENT  
DEPARTMENT OF AUDITOR-CONTROLLER**

RECEIVED

JUN 02 2016

Placer County  
Human Resources

**TO:** Lori Walsh, Human Resources Director  
**FROM:** Andrew C. Sisk, Auditor-Controller  
**DATE:** July 11, 2016  
**SUBJECT:** Request for Extension Work Out of Class (WOC) Pay

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**ACTION REQUESTED**

Employee's Name: Heidi Helm  
Current Classification: Account Clerk Senior  
WOC Classification: Accounting Technician  
Initial WOC Effective Date: February 6, 2016 PP18  
Requested Extension Effective Date: August 4, 2016  
Approximate Number of Days: 180  
Approximate End Date (End of pp): ~~February 3, 2017~~ PP17  
Reason for WOC Request: Pending Reclassification/Reallocation

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Fill Behind Leave of Absence | <input type="checkbox"/> Peak Workload/Special Project    | <input checked="" type="checkbox"/> Pending Reclassification/Reallocation |
| <input type="checkbox"/> Fill Behind Retirement       | <input type="checkbox"/> No Request to Fill Vacancy       | <input type="checkbox"/> Request to CEO to Fill Vacancy                   |
| <input type="checkbox"/> Fill Behind WOC              | <input type="checkbox"/> Temporary End WOC>80-Hours Leave | <input type="checkbox"/> Restart WOC>80-Hours Leave                       |

**BACKGROUND**

On February 6, 2016, we requested a 180 day work-out of class pay for Heidi Helm, Senior Account Clerk for reasons provided below. The Human Resources Department is currently conducting a study of this position and the work being performed. We plan to return to the Civil Service Commission on August 8, 2016 with the results of this study and determine the continuation of the work-out of class assignment.

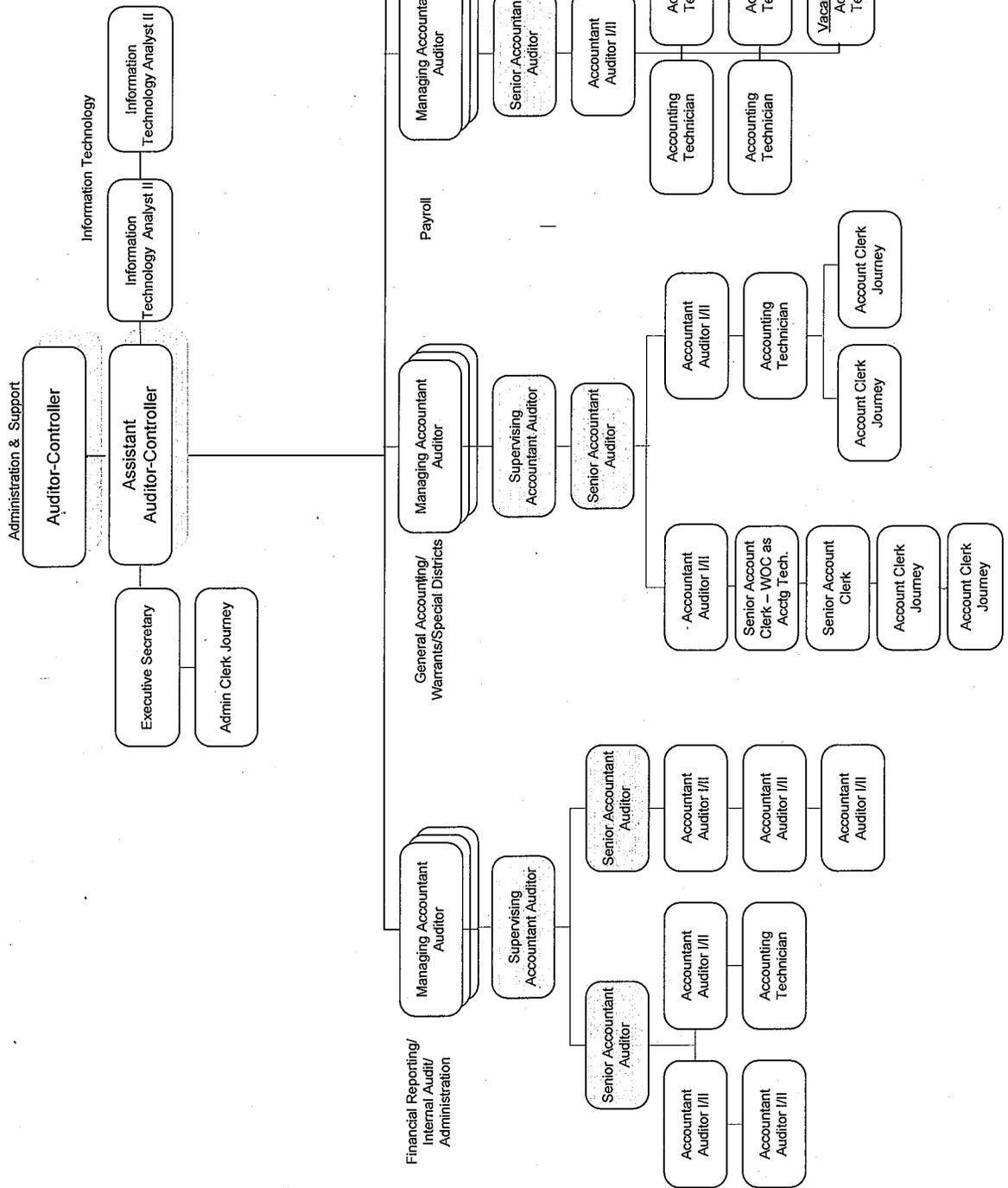
As the County moves forward with the Priority Based Budgeting initiative, our General Accounting division continues to feel the impact of increased workloads due to the amount of accounting structure changes that are required in the financial system. In addition, our office has recently restructured our divisions and duties. As a result, the General Accounting division will now be responsible for Capital Asset and Special District accounting. These increased duties require a high-level of accounting knowledge and are being performed by an Accountant-Auditor in this division who is also responsible for the day-to-day oversight of the accounts payable staff and their work.

To assist the Accountant-Auditor with these additional duties, we would like to assign the supervision and assistance with day-to-day duties, including problem-solving issues with processing of payment documents, journal entries and scanning to an Accounting Technician position. Heidi Helm, Account Clerk-Senior, has worked in the General Accounting division since March 2013 and possesses the necessary knowledge, skills and abilities to perform successfully in the General Accounting division. Her familiarity and experience in this division provides a solid understanding of the role and responsibilities necessary to perform at a higher level.

We recently submitted our fiscal year 2016-2017 budget which included an additional Accounting Technician allocation to permanently resolve this work out of class assignment.



<b>Placer County Auditor-Controller</b>	
FY 11/12 Alicitn	43
FY 12/13 Alicitn	43
FY 13/14 Alicitn	42
FY 14/15 Alicitn	42
FY 15/16 Alicitn	42
FY 16/17 Alicitn	43
<b>Funded</b>	<b>41</b>
<b>Unfunded</b>	<b>2</b>
<b>Total</b>	<b>43</b>





PLACER COUNTY  
HUMAN RESOURCES DEPARTMENT  
145 Fulweiler Avenue, Suite 200  
Auburn, California 95603-4578

CIVIL SERVICE COMMISSION  
John Costa  
Ron Le Doux  
Don Nelson  
Andrae Randolph  
Rick Ward

Lori Walsh, Human Resources Director  
Main Office: 530.889.4060  
FAX: 530.886.4626  
www.placer.ca.gov

## MEMORANDUM

**To:** Civil Service Commission  
**From:** Lori Walsh, Human Resources Director  
**By:** Kathy Youngs, Human Resource Analyst II *KYoungs*  
**Date:** July 11, 2016  
**Subject:** Classification Specification Revision for Victim Witness Supervisor

### Recommendation

It is recommended the Civil Service Commission approve the proposed revisions to the Victim Witness Supervisor classification specification.

### Basis for Recommendation

The District Attorney's Office recently requested a recruitment to fill a vacant Victim Witness Supervisor position. While preparing to open the recruitment, subject matter experts (SME's) found that the Minimum Qualifications section of the Victim Witness Supervisor classification specification does not accurately reflect the State of California Victim Witness program training requirements, or the needs of the department. Therefore, updates to this section of the classification specification are necessary, as outlined below.

The Victim Witness Supervisor classification specification was last revised in December 1996. Since that time there have been numerous processes and regulations that have changed and evolved that are not reflected in the current classification specification including:

- 1.) The certification is now received from the California Victim Compensation and Government Claims Board (VCGCB), not the State Board of Control, as currently referenced. In addition, the expectation is currently that individuals must obtain the VCGCB certification prior to the completion of the probationary period. Therefore, commensurate with the 2008 probationary period changes, the certification must be received within twelve (12) months of employment, as opposed to six (6) months, as currently referenced.
- 2.) The entry-level training course is now regulated by the California Office of Emergency Services (CalOES), not the OCJP, as currently referenced.

July 11, 2016

Classification Specification Revision Request – Victim Witness Supervisor

Page 2

- 3.) An update to include a minimum of one year of lead or supervisory experience to be consistent with other Placer County classifications with similar supervisory responsibilities.
- 4.) An update to the requirement of the CalOES Victim Witness Advocate entry-level training to complete within twelve months of employment. This update will provide the District Attorney's Office the opportunity to receive a broader pool of qualified candidates when recruiting for the position. Through discussions with the department SME's it was determined that the minimum requirement for individuals to have completed the entry-level training, prior to hire, could cause an artificial barrier during the recruitment process. Also, CalOES currently only offers the entry level training twice a year which affords the possibility that individuals may be unable to attend either training and would therefore not be qualified when recruitments open. Once hired, the District Attorney's Office monitors the certification completion.

Due to the immediate need for the District Attorney's Office to open a recruitment, the request to update the Victim Witness Supervisor classification specification is being brought forward at this time. Human Resources will continue to review and update all the specifications within this classification series and it is anticipated that the updates and revisions will be presented to your Commission in the coming months before the end of the calendar year.

Attached for the Commission's consideration is a copy of the proposed classification specification changes and the organizational chart for the District Attorney's Office. The Business Agent for Local 39, the County Executive's Office, and the District Attorney's Office have reviewed this information and concur with the recommended changes.

cc: Scott Owens, District Attorney  
Jeff Wilson, Assistant District Attorney  
Joel Joyce, Management Analyst II  
James Britton, Business Representative, IUOE Stationary Engineers Local 39

## VICTIM/WITNESS SUPERVISOR

### DEFINITION

To plan, organize, direct and supervise the Victim/Witness operation within the District Attorney's Office; and to perform a variety of technical tasks relative to assigned area of responsibility.

### DISTINGUISHING CHARACTERISTICS

The Supervisor level recognizes positions that perform full, first-line supervisory responsibilities including planning, assigning and evaluating the work of subordinates and are responsible for a program area within a work unit or department.

### SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the assigned supervisory/management staff.

Exercises direct supervision over assigned clerical and technical personnel.

### EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Recommend and assist in the implementation of goals and objectives; establish schedules and procedures for the Victim/Witness Unit activities; implement policies and procedures.

Plan, prioritize, assign, supervise and review the work of staff involved in victim/witness activities including victim advocacy, assisting victims in gaining financial retribution and representing victims that have been denied claims.

Evaluate operations and activities of assigned responsibilities; recommend improvements and modifications; prepare various reports on operations and activities.

Participate in budget preparation and administration; prepare cost estimates for budget recommendations; submit justifications for Victim/Witness unit; monitor and control expenditures.

Participate in the selection of staff; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline procedures.

Act as program coordinator for all aspects of the OCJP-California Office of Emergency Services (Cal OES) Grant and the Joint Powers Agreement for the Victim/Witness unit; write and monitor all grants received by the program.

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Review and evaluate legislation, codes and administrative regulations and develop program features and procedures to ensure program effectiveness and compliance with the requirements.

PLACER COUNTY  
September 1995  
Revised December 1996  
Revised July 2016

Develop procedures and standards for Victim/Witness case handling and management.

Conduct intake evaluations of program participants; participate in the work of Victim/Witness staff and share on-call responsibilities.

Work with a variety of other organizations and individuals to arrange and coordinate services to promote victim advocacy and solicit support; prepare scripts, speeches, brochures and press releases to promote the program; engage in public speaking opportunities before a variety of organizations for networking and educational purposes.

Train law enforcement and other agency personnel on crisis intervention and issues of sensitivity concerning victims of crime.

Answer questions and provide information to the public; investigate complaints and recommend corrective action as necessary to resolve complaints.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

#### **MINIMUM QUALIFICATIONS**

##### **Knowledge of:**

- Principles and techniques of crisis intervention and trauma reduction.
- Structure and functions of the criminal justice system.
- Principles of supervision, training and performance evaluations.
- Principles of budget monitoring.
- Principles and practices of safety management.
- Pertinent local, State and Federal laws, ordinances and rules.
- Principles of grant application preparation.

##### **Ability to:**

- Organize, implement and direct Victim/Witness operations and activities.
- Continuously review case documents; observe victims during interviews; identify necessary documentation needed per legal requirements; problem solve case status and developments; understand and interpret Division policies and procedures; explain operations to the victims and the public.

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September 1995  
Revised December 1996  
**Revised July 2016**

- On a continuous basis, sit at desk for long periods of time. Intermittently twist and reach office equipment; kneel or twist to retrieve files; write or use keyboard to communicate through written means; lift light weight.
- Supervise, train and evaluate assigned staff.
- Interpret and explain pertinent County and Department policies and procedures.
- Develop and maintain records for statistical purposes.
- Evaluate and develop procedures, standards and methods for the Victim/Witness program based on legislative requirements.
- Assist in the development and monitoring of an assigned program budget.
- Administer grant monies ensuring program compliance with grant regulations.
- Exercise independent judgement and decision making.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

**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:

**Experience:**

Three years of increasingly responsible experience in the Victim/Witness program or a closely related field, including one year of lead or supervisory experience.

**Training:**

Equivalent to an Associate's degree with major course work in criminal justice, business administration, psychology, or as closely related field.

**License or Certificate:**

- May be required need to possess, ~~or have the ability to obtain,~~ a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

PLACER COUNTY  
September 1995  
Revised December 1996  
**Revised July 2016**

- Must obtain certification from the ~~State Board of Control~~ California Victim Compensation and Government Claims Board (VCGCB) for processing of applicant claims within ~~six~~ twelve months of employment.
- ~~Must have satisfactorily completed the OGP- California Office of Emergency Services (Cal OES) entry-level Victim Witness Advocate training~~ Entry Level Victim Advocate Training Curriculum within twelve months of employment.

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**R. Scott Owens**  
District Attorney

DeeAnn Ralphs  
Admin Secty./Asst. PIO

G. Farias  
Executive Secretary  
Volunteer Coordinator

**Jeff Wilson**  
Assistant District Attorney  
Public Information Officer

<p><b>Administration Unit</b></p> <p>Nancy Aplanalp Sr. ASO</p> <p><b>Sr. ASO</b> L. Featherstone</p> <p><b>Admin Technician</b> A. Flynn Vacant/UF</p> <p><b>Sr. Account Clerk</b> Vacant/F</p> <p><b>Front Reception Admin Clerk</b> M. Mutert L. Maschmeyer</p> <p><b>Win. Notification Sr. Admin Legal Clerks</b> B. Casillas Vacant/UF Vacant/UF</p>	<p><b>VICTIM SERVICES/ASSET FORFEITURE UNIT</b></p> <p>Vacant Funded Supervising DDA</p> <p><b>Asset Forfeiture</b> C. Gehlbach</p> <p><b>Supervising-Victim Services</b> Vacant/UF <b>Sr. VW Advocate</b> L. Mitchell</p> <p><b>Sr. Claims Spec.</b> L. Lodwig</p> <p><b>Claims Spec.</b> J. Renison M. Wasner</p> <p><b>VW Advoc</b> P. Mikles T. Mosolino R. Lagala (underfill) Funded Legal Secretary) C. Matutis Vacant/F</p> <p><b>Admin Clerk</b> Vacant/UF</p> <p><b>Admin Legal Clerk</b> P. Reynoso</p> <p><b>Intake Sr. Admin Clerk</b> M. Broussard</p> <p><b>Admin Clerk</b> C. Barron J. Franco K. Eldridge</p>	<p><b>INVESTIGATION UNIT</b></p> <p>Jeff Cameron Chief Investigator</p> <p><b>Supervisor Invest.</b> J. Potter <b>Legal Secretary</b> Z. Schermerhorn</p> <p><b>Investigators</b> N. Brommeland R. Harroun D. Murchison B. Olivera S. Swanson C. Webb C. Woo V. Dutto Vacant (was M. Green)</p> <p><b>Sex Crimes DDA</b> G. Nargie</p> <p><b>Elder Abuse DDA</b> S. Quigley</p> <p><b>Sr. Legal Secy</b> T. Frazier</p> <p><b>Legal Secretary</b> K. Wagner B. La Chapelle L. Kirkwood</p> <p><b>Welfare Fraud Unit Supervisor Invest.</b> N. Tavaras</p> <p><b>Investigators</b> S. Godfrey C. Baker</p> <p><b>Investigator Asst.</b> T. Overmyer L. Austin L. Lucchetti</p> <p><b>SIU Legal Secretary</b> Debra Gordon <b>MDIC/SART/UNIT Investigator</b> M. Green Legal Secy L. Curley</p>	<p><b>FAMILY PROTECTION</b></p> <p>Jeff Wood Supervising DDA</p> <p><b>Domestic Violence</b> <b>Sr. DDA</b> C. Baillie</p> <p><b>DDA</b> L. Botwinik A. Duffy F. Noey C. Center</p> <p><b>Sex Crimes DDA</b> G. Nargie</p> <p><b>Elder Abuse DDA</b> S. Quigley</p> <p><b>Sr. Legal Secy</b> T. Frazier</p> <p><b>Legal Secretary</b> K. Wagner B. La Chapelle L. Kirkwood</p>	<p><b>MISDEMEANOR UNIT</b></p> <p>J. Miskewycz Supervising DDA</p> <p><b>Sr. DDA</b> Vacant/F</p> <p><b>Misdemeanor DUI</b> DDA S. Macumber R. Miller</p> <p><b>MISD DDA</b> D. Bass N. Cid A. Klein P. 36</p> <p><b>DDA</b> M. Paschon</p> <p><b>DUI Grant TBD</b> J. Deslaurier J. McInerney</p> <p><b>Sr. Legal Secretary</b> P. Hood</p> <p><b>Legal Secty</b> V. Mulsow C. Errico C. Bolt</p> <p><b>Sr. Leg. Secy</b> Vacant/F</p> <p><b>Legal Secretaries</b> L. Mason D. Briggs L. Kanngrisser J. Jackson S. Belding Vacant/UF Vacant/UF</p>	<p><b>FELONY TEAM</b></p> <p>Dave Tellman Supervising DDA</p> <p><b>Sr. DDA</b> T. Pecoraro</p> <p><b>ODD TEAM DDA</b> K. Everett K. Jibson R. Lopez J. Smith D. Portillo R. Dejesus</p> <p><b>Sr. Legal Secy</b> H. Beggs</p> <p><b>EVEN TEAM DDA</b> A. Bellah M. Baxley J. Moore D. Wesp</p> <p><b>Sr. Legal Secy</b> Vacant/F</p> <p><b>Legal Secy</b> M. Penwell C. Devany</p>	<p><b>PUBLIC INTEGRITY Unit</b></p> <p>D. Van Breenen Supervising DDA</p> <p><b>Consumer &amp; Envir. Fraud</b> <b>Sr. DDA</b> J. Crue</p> <p><b>Welfare &amp; Public Asst. Fraud DDA</b> M. Block</p> <p><b>Paralegal</b> D. Gulick</p> <p><b>Workers Comp Investigator</b></p>	<p><b>Juvenile &amp; Tahoe Unit</b></p> <p>C. Gehlbach Supervising DDA</p> <p><b>Juvenile Branch</b> <b>Sr. DDA</b> D. Broady</p> <p><b>DDA</b> C. Jilot M. Begley</p> <p><b>Legal Secy</b> T. Magnuson Vacant/UF</p> <p><b>Tahoe Branch</b> <b>Sr. DDA</b> C. Cattran</p> <p><b>DDA</b> M. Leftwich</p> <p><b>Legal Secy</b> M. Del Barba K. Shye</p>	<p><b>IT UNIT</b></p> <p><b>Tech. Sol. Analyst II</b> M. Killian</p> <ul style="list-style-type: none"> <li>• Wireless</li> <li>• Ipad</li> <li>• Hardware</li> </ul> <p>R. Pointer E-Services</p> <ul style="list-style-type: none"> <li>• Dannon</li> </ul>
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# MEMORANDUM

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**DATE:** July 11, 2016

**TO:** Civil Service Commission

**FROM:** Lori Walsh, Human Resources Director

**BY:** Kelly Tourville, Personnel Analyst I

**SUBJECT:** Classification Specification Revision for Library Assistant, Senior

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## **Recommendation**

It is recommended the Civil Service Commission approve the proposed revisions to the Library Assistant, Senior classification specification.

## **Background**

The Placer County Bookmobile is a full-service traveling library offering books, magazines, audio books, CDs, and DVDs for all ages. The Library Department has utilized a Bookmobile as a mobile library branch for the past 46 years; since October 1970. The Bookmobile provides library services to many people who would otherwise find them difficult to access, such as those living in remote areas, or those who are unable to travel from their homes easily. The current Bookmobile has been in use since 1984 and has traveled over 300,000 miles. It requires a Class B driver's license with air brake endorsements to drive it. The Placer County Library recently acquired a new vehicle that they will soon use to provide mobile library services. The new requires a standard Class C driver's license. The Placer County Library plans to use the current Bookmobile through July, at which time it will be taken out of service. They plan to start using the new Bookmobile in September.

As part of the County's classification plan, the Bookmobile is driven and managed by a Senior Library Assistant. This classification specification was last updated in 2004. The current incumbent has been assigned to the Bookmobile for the past twelve years and recently retired, creating a vacancy for the Placer County Library and a need to conduct a new recruitment. In the meantime, the Placer County Library is staffing the Bookmobile with bus drivers from the Department of Public Works and Facilities with

other Library staff on board to provide library services until the position can be permanently filled.

**Basis for Recommendation**

Because the new Bookmobile does not require a Class B driver's license, the license requirement in the current classification specification for Library Assistant, Senior is no longer accurate.

In order to attract and recruit applicants with the correct qualifications, it is being recommended that the driver's license requirement currently be updated to reflect the requirements for operating the new vehicle. Other recommended revisions to the classification specification include:

- Removing reference to budget preparation, as that task is now centralized and performed department-wide by the Senior Administrative Services Officer.
- Adding "use reference interviews to assess customer needs" to the Examples of Essential Duties section to reflect current service requirements.
- Removing the reference to the manual process of cataloging and circulation, as well as the maintenance of bibliographies, as these functions are now automated and the current language is outdated.

Attached for the Commission's review and consideration are copies of the recommended classification specification updates in add/delete format and an organizational chart for the Placer County Library with the branches that utilize the Library Assistant, Senior classification highlighted in green.

The County Executive's Office, IUOE Stationary Engineers Local 39, and the Placer County Library have reviewed this information and concur with the recommended changes.

cc: Mary George, Director of Library Services  
Anthony Crans, Business Representative, IUOE Stationary Engineers Local 39  
Bryan Hacker, Management Analyst, Senior

**SENIOR LIBRARY ASSISTANT  
(BRANCH MANAGER)**

**DEFINITION**

To perform technical library work in support of the County library system and provide various library services to professional library staff and ~~customersthe public~~; to oversee the operations of a medium-sized library branch or the Bookmobile, including reference services, selection and weeding, budgeting, and supervising technical and clerical library staff; to assist with meeting customers' information needs for books and materials which includes identifying and locating materials and information by researching and interpreting print, on-line and other sources; assist with collection development by making suggestions and ordering new materials and replacing materials; to advise library customers of various library services and adjunct activities; and to perform circulation, collection and reference duties.

**DISTINGUISHING CHARACTERISTICS**

This is the advanced journey level position in the Library Assistant series. Employees at this level perform the full range of duties, and are typically assigned significant responsibilities above the journey level, which requires specialized knowledge, abilities, skills and experience. Incumbents at this level often exercise independent judgment in the performance of their duties. This class is distinguished from the Library Assistant II in that incumbents are responsible for managing a library branch, with responsibility for budgeting and supervising library personnel as part of the normal scope of their duties.

**SUPERVISION RECEIVED AND EXERCISED**

Exercises direct supervision over technical, clerical and volunteer staff.  
Receives direction from management or professional staff.

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

Direct and oversee the day-to-day operations in a mid-sized library branch.

Supervise, train, schedule and evaluate library staff.

~~Prepare and m~~Maintain branch budget.

Provide services to library customers and staff in locating books, materials and information; use reference interviews to assess customer needs~~answering reference questions~~ and assisting ~~the~~customers with understanding and effectively utilizing library services and resources.

Answer customers questions by researching and interpreting print, on-line and other sources; place holds as requested.

## PLACER COUNTY

Senior Library Assistant (Branch Manager)

(Page 2)

Perform Selector duties relative to reading, researching and making lists of recommendations for purchase throughout County system; and assist with collection development by making suggestions of new books and material, creating book lists, ordering said books and materials, weeding, repairing and replacing books and materials when needed.

~~Process, catalog, and prepare library materials for circulation; establish and maintain collection files and records; e~~Conduct and oversee inventories of books and other library materials; ~~and maintain bibliographies.~~

Check books and other materials in and out of library; shelve materials and review shelves for misshelved materials.

Compute, collect, receipt and record monies collected for overdue, lost or damaged materials; prepare and submit statistical reports as required.

Work with appropriate department representative on interlibrary loans.

~~Act as liaison between the library and the community with cooperative libraries, Friends of the Library and community groups.~~

~~Develop and e~~Conduct various special programs and community outreach activities such as story time, ~~S~~summer reading programs, and library tours.

Operate and maintain various library-related equipment, information systems and general office equipment.

Perform clerical duties as needed.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Adhere to safety policies and procedures.

Perform related duties as assigned.

### **Bookmobile**

**When assigned to Bookmobile, perform duties above in addition to the following:**

Participate in determining bookmobile stops.

Select materials for Bookmobile collection relative to the needs of customers at each stop.

Drive, maintain, and coordinate the repair of the bookmobile unit.

### **MINIMUM QUALIFICATIONS**

#### **Knowledge of:**

- Operations of a branch library.
- Principles of employee supervision and library branch management.
- Budget preparation and monitoring.
- Public relations and report writing.
- Standard library practices, techniques and terminology.

PLACER COUNTY

Senior Library Assistant (Branch Manager)

(Page 3)

- General procedures involved in receipt, circulation and storage of library materials.
- Public library collections, including reference sources and bibliographical works.
- General library classification and filing systems.
- Computer applications in a library environment.
- Modern office procedures and methods.
- Principles and practices of work safety.
- Public desk etiquette, telephone etiquette and effective communication skills.
- Business arithmetic and statistical analysis.
- Safety policies and procedures.

**Ability to:**

- Perform advanced journey level para-professional technical work.
- Manage the operations of a branch library including day-to-day operations and supervision and training of library staff.
- Be accountable for branch library materials budget; prepare recommended lists for purchase of library materials.
- Understand, interpret and explain administrative/operational procedures and practices of the County's library systems.
- Independently provide technical and reference assistance to subordinate library personnel and library customers.
- Perform specialized circulation, collection and reference duties.
- Utilize designated word processing, spreadsheet and/or database software programs and library information systems including but not limited to indexes, catalogs and other on-line research methods.
- Understand and carry out a variety of both oral and written instructions; communicate clearly and concisely, both orally and in writing.
- Intermittently review documents related to library operations; observe, identify and problem solve library operations and procedures; understand, interpret and explain library policies and procedures.
- Work with various cultural and ethnic groups in a tactful and effective manner.

PLACER COUNTY

Senior Library Assistant (Branch Manager)

(Page 4)

- Act quickly and calmly in emergency situations.
- Maintain confidentiality of customer records.
- Obtain information through interview; work fairly and courteously with the public; and work effectively with interruption.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Work in a standard office environment, using standard office equipment and computer systems and attend off-site meetings. Sit at desk and/or stand for long periods of time. Intermittently bend, twist, reach, grasp, kneel or squat while shelving, opening boxes or moving equipment; see and read handwritten and printed materials and a computer screen; write and use keyboard to communicate and to enter circulation and collection data; communicate in person and by telephone; file, lift and carry weight up to 50 lbs; push handcart up to 50 lbs.
- Work weekend and evening shifts as assigned.

**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:

**Experience:**

One year of technical or paraprofessional level experience in a public library.

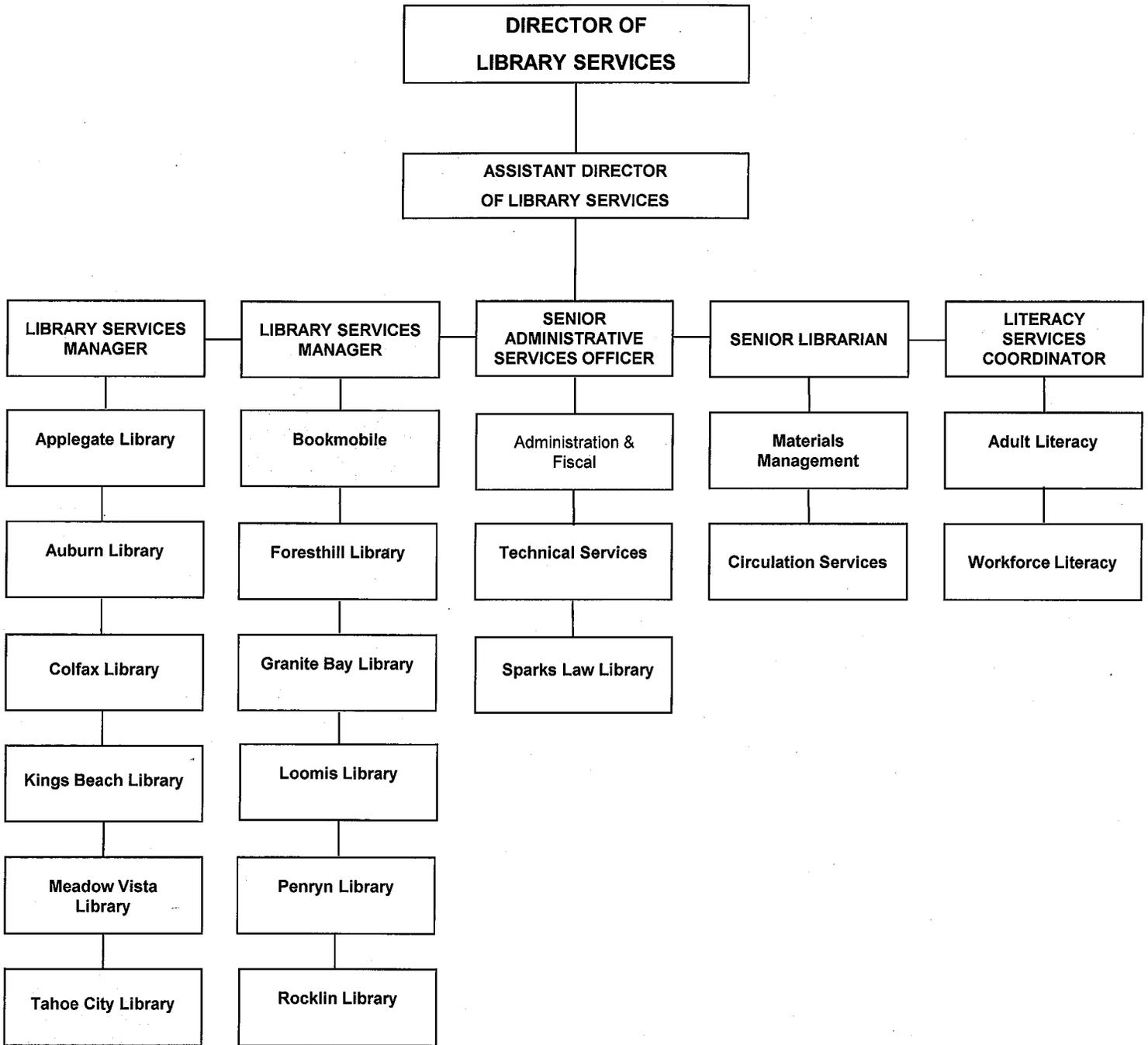
**Training:**

Equivalent to a Bachelor's degree in a discipline closely related to the knowledge, skills and abilities required for this position.

**License or Certificate:**

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.
- ~~Bookmobile: When assigned to the Bookmobile, possession of, or ability to obtain by the end of probation, a valid Class B driver's license.~~

# LIBRARY





# MEMORANDUM

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**DATE:** July 11, 2016

**TO:** Civil Service Commission

**FROM:** Lori Walsh, Human Resources Director

**BY:** Kelly Tourville, Personnel Analyst I

**SUBJECT:** New Classification Request and Classification Specification Revisions - Revenue Services Division of Administrative Services

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## **Recommendation**

It is recommended the Civil Service Commission approve:

- 1.) The proposed revisions to the following classification specifications;
  - Collection Agent I, Grade GNRL 52 (\$18.94 - \$23.03 hourly)
  - Collection Agent II, Grade GNRL 64 (\$20.89 - \$25.39 hourly)
  - Collection Agent, Senior, Grade GNRL 82 (\$24.18 - \$29.39 hourly)
  - Revenue Services Manager, Grade MNGT 431 (\$39.30 - \$47.76 hourly)
  
- 2.) The creation of a new classification specification and salary recommendation for Revenue Services Supervisor, Grade GNRL 109 (\$30.16 - \$36.65 hourly).

## **Background**

The Revenue Services Division of the Administrative Services Department has collected over 23 million dollars in revenue in each of the past two fiscal years. Over this fiscal year, that number has climbed to nearly 25 million dollars collected for the County. These revenues come from areas such as court fines and fees, franchise fees, Transient Occupancy Taxes (TOT), and previously uncollected County debt. According to the Administrative Services Department, there is potential for this number to grow even higher.

Recognizing this, and knowing that there have been advancements in technology as well as changes to internal workflows, the Administrative Services Department

requested that Human Resources conduct a comprehensive analysis of the positions and classifications within the entire Revenue Services Division in order to accomplish the following:

- Validate that employees are appropriately classified;
- Review and update existing classification specifications as needed, and/or identify and develop new classification specifications as deemed necessary which are consistent with department needs and the Countywide classification plan;
- Identify improvements and resources needed to maximize efficiency and consistency, streamline current processes and workflow, and effectively recruit/fill upcoming vacancies with appropriate, up-to-date classifications.

The Revenue Services Division currently consists of sixteen positions assigned to seven different classifications as noted in the attached organizational chart. During the study, it was determined that the clerical and accounting positions were performing duties within the scope of their classification specifications. These classifications include Accounting Technician, Account Clerk Journey, and Administrative Clerk, Senior. Therefore, the changes being requested as a result of this study focus on the Collections positions, as well as the supervision and management of the division.

### **Basis for Recommendation**

Position Inventory Questionnaires (PIQs) were completed and submitted by all study participants with review and approval by Administrative Services executive management prior to submission to the Human Resources Department. Human Resources staff reviewed all PIQs submitted and conducted interviews and desk audits with representatives from each classification studied. Based on the information obtained through the PIQs, interviews, and desk audits, as well as follow-up discussions with Administrative Services executive management, Human Resources analyzed each position and developed recommended classifications with a corresponding organizational structure for the division.

The information provided indicates that all staff are appropriately classified. The classification specifications of Collection Agent I/II, Collection Agent Senior, and Revenue Services Manager require updates which do not change the level of the work, but rather provide a more updated, detailed, and realistic understanding of what the duties entail. A review of each of these classifications, along with the reasoning behind the proposed changes, is summarized below.

**Collection Agent I/II** – Primary functions of this classification include locating payees and setting up payment plans to collect on delinquent accounts on behalf of the County and the Courts. While all employees currently allocated to this classification are

classified correctly, updated language is being proposed to the associated duties, knowledge, skills, and abilities to reflect current processes and updated technology, such as:

- Using software from outside agencies such as the Department of Motor Vehicles, the Franchise Tax Board, courts, etc., to locate clients and obtain demographic information.
- Receiving and processing financial or statistical documents.
- Screening for accuracy and adherence to legal and procedural requirements.
- Determining client eligibility and making recommendations for specific programs and waivers using established practices.
- Making mathematical calculations related to payment schedules; accepting payments and issuing receipts.

Feedback from the Health and Human Services department, which also utilizes this classification and the Collection Agent, Senior classification, was obtained and staff is supportive of the proposed changes to the class specification.

**Collection Agent, Senior** – This classification performs the more complex, advanced journey level collections duties in addition to providing administrative support to higher-level staff. While the Administrative Services incumbent in this classification is correctly classified, specification updates are being proposed to update the supervision received (to incorporate the proposed classification of Revenue Services Supervisor), duties, and knowledge, skills, and abilities. Some of these changes include:

- Troubleshooting basic computer issues.
- Explaining and interpreting assignment specialty area policies and procedures to internal or external customers; explaining information to customers regarding amounts owed, fees, and payment options.
- Using software from outside agencies such as the Department of Motor Vehicles, the Franchise Tax Board, courts, etc., to locate clients and obtain demographic information.
- Receiving and processing financial or statistical documents; screening for accuracy and adherence to legal and procedural requirements.
- Determining client eligibility for specific programs and waivers using established practices.
- Making mathematical calculations related to payment schedules; accepting payments and issuing receipts.
- Calculating, reporting, and maintaining statistical data as requested.

**Revenue Services Manager** – Currently, this classification provides day-to-day supervision of the entire unit, which consists of two primary specialty areas: accounting and collections. Primary responsibilities include resolving complex issues or questions escalated from other staff in the division; direct supervisory oversight of all staff, including writing and delivering performance evaluations, recommending and

implementing discipline, and providing and coordinating staff training; planning and organizing all activities within the division; recommending and assisting in the implementation of division goals, and assisting in the preparation of the Revenue Services Division budget.

Despite the fact that advanced journey level staff is utilized to provide input and feedback regarding employee performance and to resolve difficult questions or issues as they arise, the span of control for Revenue Services Manager under the current organizational structure is too broad. Therefore, the creation of a supervisor classification as described below is recommended to allow the Revenue Services Manager the ability to oversee staff at a division management level. Classification specification changes are recommended to the supervision, duties, and knowledge and abilities sections, including:

- Maintaining discipline and high standards necessary for the efficient and professional operation of the Revenue Services Division.
- Providing direction and guidance to subordinate staff as they undertake staff development; identifying and tracking training needs; initiating training programs and evaluating training activities.
- Analyzing and troubleshooting multiple systems related to collections; referring significant systems failures to the proper source of service; consulting with vendors regarding collection services equipment and techniques; assisting in systems analysis and making recommendations for efficiency.
- Providing training for supervisory staff in personnel management functions such as counseling, discipline, performance evaluation and public relations; ensuring that division staff are trained in the systems and procedures related to collections; troubleshooting problems.
- Representing the Revenue Services Division to outside agencies, vendors and organizations; participating in outside community and professional groups and committees.

**Revenue Services Supervisor** (*proposed new classification*) - The creation of a supervisory level classification between the management and advanced journey levels will alleviate a great deal of the day-to-day supervisory responsibilities from the Revenue Services Manager, which will in turn facilitate the ability of the manager to focus more on the managerial duties and functions of the position. As a first line supervisor, the incumbent in this new classification would exercise immediate supervision over staff from both the Accounting and Collections units, as well as the day-to-day supervision of the division, including the following:

- Planning, prioritizing, assigning, supervising and reviewing the work of staff involved in revenue services activities.

- Evaluating operations and activities of the work unit; recommending improvements and modifications; preparing various reports on operations and activities; and preparing and maintaining other reports and records.
- Participating in the selection of staff; supervising assigned Revenue Services staff; directing training and staff development in coordination with higher level staff; preparing first-line supervisory performance evaluations and overseeing preparation of line staff evaluations; recommending discipline; implementing discipline procedures as directed.
- Supervising training activities of assigned work unit or section; training lead staff; ensuring that new personnel are trained in the systems and procedures related to program functions including operation of systems used; troubleshooting problems and responding to questions and inquiries from other department staff.
- Assuring that subordinate staff understand and comply with all policies and procedures of the Revenue Services Division.
- Providing technical assistance on special projects for department and County management personnel.
- Researching and collecting data, and preparing statistical, technical and/or administrative reports as required; preparing written correspondence; participating in the preparation of procedural manuals for Revenue Services staff.
- Assisting staff with difficult situations, both on the phone and in person.
- Answering questions and providing information to the public; investigating complaints and recommending corrective action as necessary.
- Providing back-up support to the Revenue Services Manager as required.

Consistent with Placer County Code 3.08.520, all employees have had an opportunity to review and comment on these recommendations. Attached for the Commission's review and consideration are copies of the recommended classification specification updates in add/delete format, a draft classification specification for the proposed Revenue Services Supervisor, current and revised organizational charts for the Revenue Services Division, and copies of the employee PIQs.

The County Executive's Office, the Placer Public Employees Organization (PPEO), the Administrative Services Department, and the Health and Human Services Department have reviewed this information and concur with the recommended changes.

cc: Jerry Gamez, Director of Administrative Services  
Anthony Crans, Business Representative, IUOE Stationary Engineers Local 39  
Joel Joyce, Management Analyst II

PLACER COUNTY

September 1995

July 2004

July 2016

## COLLECTION AGENT I COLLECTION AGENT II

### DEFINITION

To compile and evaluate information needed to collect on delinquent accounts; collect on delinquent accounts using written, telephone and personal communications; make initial determinations or recommendations of appropriate action in collection cases; to administer collection programs in line departments, ~~appear in court as necessary,~~ and work within a department as assigned.

### DISTINGUISHING CHARACTERISTICS

**Collection Agent I:** This is the entry level class in the Collection Agent series. This class is distinguished from the journey by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgement on matters allocated to the journey level. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. Employees work under immediate supervision while learning job tasks.

**Collection Agent II:** This is the full journey level class within the Collection Agent series. This class is distinguished from the Collection Agent I by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the entry level.

This class is distinguished from the Senior Collection Agent in that the latter is an advanced journey level and functions as a lead supervisor over other collection agents.

### SUPERVISION RECEIVED AND EXERCISED

#### COLLECTION AGENT I

Receives ~~immediate~~ direct supervision from the Revenue ~~Services Supervisor~~ ~~Manager~~ or assigned supervisor and technical and functional supervision from the assigned Senior Collection Agent, or assigned supervisory or management personnel.

#### COLLECTION AGENT II

Receives general supervision from the Revenue ~~Services Supervisor~~ ~~Manager~~ or assigned supervisor and technical and functional supervision from the assigned Senior Collection Agent, or assigned supervisory or management personnel.

~~May exercise technical supervision over secretarial and accounting clerical staff.~~

PLACER COUNTY

Collection Agent I

Collection Agent II (Page 2)

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

—Obtain collections on delinquent accounts through correspondence, telephone communications and personal interviews.

—Confer with Revenue Services Supervisor/Manager or assigned supervisor and/or staff of the County Counsel/District Attorney regarding the initiation of legal actions; assist County Counsel/District Attorney in providing information needed for legal actions; represent the County at the small claims court and may testify on other legal cases filed by the County Counsel or District Attorney; prepare draft legal documents for review by assigned legal counsel.

Explain and interpret assignment specialty area policies and procedures to internal or external customers; explain information to customers regarding amounts owed, fees, and payment options.

Interview clients to obtain information for completion of financial statements and other information to determine payment schedules on accounts owed.

Contact businesses, neighbors, credit unions and other leads to trace and contact persons with delinquent accounts.

Use software from outside agencies such as the Department of Motor Vehicles, the Franchise Tax Board, courts, etc., to locate clients and obtain demographic information. Receive and process financial or statistical documents; screen for accuracy and adherence to legal and procedural requirements.

Determine client eligibility and make recommendations for specific programs and waivers using established practices.

Enter information into a personal computer or automated system for the maintenance of records and reports indicating the status of collection activities; maintain case tracking system.

Make mathematical calculations related to payment schedules; accept payments and issue receipts.

Prepare statements of amounts due; prepare installment payment receipts; and maintain files and records pertaining to accounts.

Calculate, report, and maintain statistical data as requested.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

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**MINIMUM QUALIFICATIONS**

**COLLECTION AGENT I**

**Knowledge of:**

- Financial record keeping.
- Sources of information used in locating persons.
- Methods used for the collection of delinquent accounts.

PLACER COUNTY

Collection Agent I

Collection Agent II (Page 3)

- Computer software, including word processing, database, spreadsheet and other related applications.
- Modern office procedures, methods, and computer equipment.
- English usage, spelling, punctuation and grammar; arithmetic and basic mathematical calculations.
- Principles and practices of customer service and public contact.

**Ability to:**

- ~~On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; communicate clearly by telephone and in person; lift light weight.~~
- ~~Intermittently, review documents related to Department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain Department policies and procedures; explain operations and problem solve office issues for the public and with staff.~~
- Learn the general functions of a collection agency and commercial law applicable to collections.
- Learn, interpret and apply to specific cases, the provisions of laws, rules or regulations enforced or administered by the County.
- Prepare reports and maintain records.
- Analyze situations accurately and take effective actions.
- Establish and maintain effective working relationships with others those contacted in the course of work.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Obtain information through interview; communicate professionally and courteously with the public.
- Develop and maintain an efficient, calm demeanor when handling adverse situations.
- Use a personal computer and office equipment necessary for successful job performance.
- Write and speak clearly and effectively.
- On a continuous basis, sit at a desk and/or stand at a counter for long periods of time. Intermittently twist and reach for office equipment; write and use keyboard to communicate through written means; communicate clearly by telephone and in person; lift light weight.

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PLACER COUNTY

Collection Agent I

Collection Agent II (Page 4)

- Intermittently review documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve office issues for the public and with staff.

**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:

**Experience:**

One year of responsible collections or accounts receivable experience.

**Training:**

Equivalent to the completion of the twelfth grade.

**License or Certificate:**

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

**COLLECTION AGENT II**

In addition to the qualifications for Collection Agent I:

**Knowledge of:**

- Particular provisions of laws, rules or regulations enforced or administered by the County.
- General functions of a collection agency and commercial law applicable to collections.
- Operations, procedures and regulations applicable to assignment—assigned department.

**Ability to:**

- ~~On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; communicate clearly by telephone and in person; lift light weight.~~
- ~~Intermittently, review documents related to Department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain Department policies and procedures; explain operations and problem solve office issues for the public and with staff.~~
- Perform the general functions of a collection agency and apply commercial law applicable to collections.

PLACER COUNTY

Collection Agent I

Collection Agent II (Page 5)

- Interpret and apply to specific cases, the provisions of laws, rules or regulations enforced or administered by the County;

**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:

**Experience:**

Two years of responsible experience in collections work performing duties similar to a Collection Agent I in Placer County.

**Training:**

Equivalent to the completion of the twelfth grade.

**License or Certificate:**

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

PLACER COUNTY

September 1995

July 2016

## SENIOR COLLECTION AGENT

### DEFINITION

To perform the more difficult or complex work in the collection of delinquent accounts; work within a department as assigned; and provide technical and functional supervision of Collection Agents or ~~other~~ assigned personnel, and provide administrative support to higher level staff..

### DISTINGUISHING CHARACTERISTICS

This is the advanced journey level class in the Collection Agent series. Employees within this class are distinguished from the Collection Agent II by the performance of the full range of duties as assigned including the most difficult or complex collections work and providing lead-supervision ~~for~~ Collection Agents and other ~~other~~ assigned personnel. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

### SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Revenue Services Supervisor ~~Manager~~ or assigned supervisory or management personnel.  
Exercises technical and functional supervision over assigned Collection Agent I and Collection Agent II personnel.

### EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Plan and coordinate the work of Collection Agents; provide technical and functional direction for work assignments.

Assist in evaluating the work performance of subordinates, assist in resolving problems, and recommend methods to increase effectiveness and efficiency of collections work.

Train employees in collection techniques, evaluation of information obtained and collection policies and procedures.

Interpret collection policies and legal requirements for employees and the public.

Produce reports, perform automated system backups, coordinate with MIS County Information Technology personnel and automated system vendor(s) and interpret technical information for non-technical users; troubleshoot basic computer issues.

Obtain collections on delinquent accounts through correspondence, telephone communications and personal interviews.

Confer with Revenue Services Supervisor ~~Manager~~ or assigned supervisor, and/or staff of the County Counsel or District Attorney's Office regarding the initiation of legal actions; ~~assist County Counsel in providing information needed for legal actions; and represent~~

PLACER COUNTY  
Senior Collection Agent (Page 2)

~~the County at the small claims court and may testify on other legal cases filed by the County Counsel or District Attorney.~~

Explain and interpret assignment specialty area policies and procedures to internal or external customers; explain information to customers regarding amounts owed, fees, and payment options.

Interview clients to obtain information for completion of financial statements and other information to determine payment schedules on accounts owed.

Contact businesses, neighbors, credit unions and other leads to trace and contact persons with delinquent accounts.

Use software from outside agencies such as the Department of Motor Vehicles, the Franchise Tax Board, courts, etc., to locate clients and obtain demographic information.

Receive and process financial or statistical documents; screen for accuracy and adherence to legal and procedural requirements.

Determine client eligibility for specific programs and waivers using established practices.

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Enter information into a personal computer system for the maintenance of records and reports indicating the status of collection activities; maintain case tracking system.

Make mathematical calculations related to payment schedules; accept payments and issue receipts.

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Prepare statements of amounts due; ~~prepare installment payment receipts; and maintain files and records pertaining to accounts.~~

Calculate, report, and maintain statistical data as requested.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

## MINIMUM QUALIFICATIONS

### Knowledge of:

- Collection and investigation techniques.
- Principles and practices of supervision, workload scheduling, and priority setting.
- General functions of a collection agency and commercial law applicable to collections.
- Financial record keeping.
- Sources of information used in locating persons.
- Particular provisions of laws, rules or regulations enforced or administered by the County.
- Operations, procedures and regulations applicable in assigned department.
- Sources of information used in locating persons.
- Methods used for the collection of delinquent accounts.

PLACER COUNTY  
Senior Collection Agent (Page 3)

- Computer software, including word processing, database, spreadsheet and other related applications.
- Modern office procedures, methods, and computer equipment.
- English usage, spelling, punctuation and grammar; arithmetic and basic mathematical calculations.
- Principles and practices of customer service and public contact.

**Ability to:**

- ~~On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; communicate clearly by telephone and in person; lift light weight.~~
- ~~Intermittently, review documents related to Department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain Department policies and procedures; explain operations and problem solve office issues for the public and with staff.~~
- Direct and coordinate the work of other employees.
- Train employees in the procedures and techniques for effective collections work.
- Interpret and apply to specific cases, the provisions of laws, rules or regulations enforced or administered by the County.
- Prepare reports and maintain records.
- Analyze situations accurately and take effective actions.
- Establish and maintain effective working relationships with other those contacted in the course of work.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Obtain information through interview; communicate professionally and courteously with the public.
- Develop and maintain an efficient, calm demeanor when handling adverse situations.
- Use a personal computer and office equipment necessary for successful job performance.
- ~~Write and speak clearly and effectively.~~
- ~~Learn to p~~Perform computer operating system administration and procedures, and application system administration and database maintenance.
- ~~Learn to a~~Apply technical knowledge to solve problems related to the Aautomated Revenue Ccollection Ssystems.

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PLACER COUNTY

Senior Collection Agent (Page 4)

- On a continuous basis, sit at a desk and/or stand at a counter for long periods of time. Intermittently twist and reach for office equipment; write and use keyboard to communicate through written means; communicate clearly by telephone and in person; lift light weight.
- Intermittently review documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve office issues for the public and with staff.

**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:

**Experience:**

Two years of responsible journey level experience in performing collections work performing duties similar to a Collection Agent II in Placer County.

**Training:**

Equivalent to the completion of the twelfth grade.

**License or Certificate:**

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

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## REVENUE SERVICES MANAGER

### DEFINITION

To plan, organize, direct, and ~~manages~~supervise the activities of the Revenue Services Division within the Administrative Services Department including centralized billing and collections for various County departments; to coordinate collections activities with other divisions and departments; and to provide staff assistance to the Director of Administrative Services.

### DISTINGUISHING CHARACTERISTICS

The ~~M~~anager level recognizes positions that provide full ~~line~~ and functional management responsibility for a division or program area within a department.

### SUPERVISION RECEIVED AND EXERCISED

~~Receives administrative direction from higher level staff, general direction from the Deputy Director of Administrative Services or the Director of Administrative Services.~~  
Exercises direct supervision over assigned supervisory, technical and clerical personnel.

### EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

Recommend and assist in the development and implementation of ~~D~~divisional goals, objectives, policies and procedures.

Plan, organize, direct and ~~manages~~supervise Revenue Services activities including the collection of debts owed to the County other than property taxes, serving as Tax Administrator, financial hearing officer, and preparation of data for legal actions to recover delinquent collections, and managing staff.

Participate in the development of the Revenue Services Division work plan; assign work activities, projects and programs; monitor work flow; ~~assist in the~~ review and evaluation of work products, methods and procedures.

Plan, organize, direct and ~~manages~~supervise the Revenue Services accounting program, including the collection and reportingdisbursement of funds entitled to Placer County and other government entities ~~finances and fees~~.

Administer and/or perform the most complex accounting and financial analyses.

Design, implement, update and document accounting and financial management systems; establish procedures for work flow and format.

PLACER COUNTY  
Revenue Services Manager (Page 2)

Prepare a variety of complex periodic and special reports; prepare correspondence; and interpret and explain policies and procedures to the public, department staff and/or other departments.

Assist in the preparation of the Revenue Services budget; assist in budget implementation; participate in the forecasting of funds needed for staffing, equipment, materials and supplies; administer the approved budget.

~~Participate in the selection of staff~~ Recommend the appointment of personnel; provide or coordinate staff training; conduct performance evaluations; recommend discipline; implement discipline procedures as directed, and maintain discipline and high standards necessary for the efficient and professional operation of the Revenue Services Division

Provide direction and guidance to subordinate staff as they undertake staff development; identify and track training needs; initiate training programs and evaluate training activities.

Analyze and troubleshoot multiple systems related to collections; refer significant systems failures to the proper source of service; consult with vendors regarding collection services equipment and techniques; assist in systems analysis and make recommendations for efficiency.

Provide training for supervisory staff in personnel management functions such as counseling, discipline, performance evaluation and public relations; ensure that division staff are trained in the systems and procedures related to collections; troubleshoot problems.

Represent the Revenue Services Division to outside agencies, vendors and organizations; participate in outside community and professional groups and committees.

Answer questions and provide information to personnel of County departments; investigate operational issues or complaints and recommend corrective action as necessary.

Act as a liaison with federal, state, and local governmental agencies regarding assigned program.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

## MINIMUM QUALIFICATIONS

### Knowledge of:

- Methods and techniques used for effective billing, collections and investigations for collection of current and delinquent accounts.
- Generally accepted accounting principles and procedures and their specific application in governmental accounting.
- Application and operation of computerized accounting systems, spreadsheets, and automated systems for billing and financial record keeping using common accounting and spreadsheet software.
- Local, State and Federal rules, regulations and laws, applicable to the collection and disbursement of County fines and fees.
- Modern office procedures, methods and computer equipment.
- Principles and practices of policy development and implementation.
- Principles and practices used in planning, organizing and controlling work flow and processes.
- Budgeting procedures and techniques.
- Principles and practices of supervision, training, evaluation and personnel management.
- Principles and practices of customer service and public contact.
- Principles and practices of work safety.

### Ability to:

- Organize and supervise the operations of the Revenue Services Division.
- ~~• On a continuous basis, analyze budget and technical reports; interpret and evaluate staff reports; know laws, regulations and codes; observe performance and evaluate staff; problem solve Division related issues; remember various rules; and explain and interpret policy.~~
- ~~• On a continuous basis, sit at desk and in meetings for long periods of time. Intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone and communicate through written means.~~
- Perform the most complex work of the Division.
- Design improvements and controls for assigned operations; and assess overall effectiveness of programmatic responsibilities.
- Interpret and apply legal, regulatory and administrative controls to accounting functions and financial management systems.

## PLACER COUNTY

### Revenue Services Manager (Page 4)

- Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
- Gain cooperation through discussion and persuasion.
- Interpret and apply county and Department policies, procedures, rules and regulations.
- Prepare and administer a budget.
- Supervise, train and evaluate personnel.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Communicate clearly and concisely, both orally and in writing.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- On a continuous basis, analyze budget and technical reports; interpret and evaluate staff reports; know laws, regulations and codes; observe performance and evaluate staff; problem solve Division related issues; remember various rules; and explain and interpret policy.
- On a continuous basis, sit at desk and in meetings for long periods of time. Intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone and communicate through written means.

#### **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:

##### **Experience:**

Four years of increasingly responsible experience in accounts receivable or revenue billing with responsibilities for collecting delinquent accounts, including two years of supervisory or lead-responsibility.

##### **Training:**

Equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting, business administration, public administration, or a related field.

##### **License or Certificate:**

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

## **REVENUE SERVICES SUPERVISOR**

### **DEFINITION**

To plan, organize, direct, and supervise revenue services operations within the Administrative Services Department; to provide staff assistance to the Revenue Services Manager; and to perform a variety of technical tasks relative to assigned area of responsibility.

### **DISTINGUISHING CHARACTERISTICS**

Positions at this level perform full, first-line supervisory responsibilities which include planning, assigning and evaluation of work of subordinates in the Revenue Services Division.

This class is distinguished from the Revenue Services Manager in that the latter provides full functional management responsibility for the entire Revenue Services function in Administrative Services, whereas this class is responsible for the day-to-day supervision of an assigned work unit within a department.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from the Revenue Services Manager.

Exercises direct supervision over collections, accounting, and other assigned personnel.

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

Recommend and implement unit goals and objectives; establish schedules and methods for a collections center; draft for approval and implement policies and procedures.

Plan, prioritize, assign, supervise and review the work of staff involved in revenue services activities.

Evaluate operations and activities of the work unit; recommend improvements and modifications; prepare various reports on operations and activities; and prepare and maintain other reports and records.

Participate in budget preparation and administration; prepare cost estimates for budget recommendations; submit justifications for staff, materials and supplies as needed; monitor and control expenditures.

Participate in the selection of staff; supervise assigned Revenue Services staff; direct training and staff development in coordination with higher level staff; prepare first line supervisory performance evaluations and oversee preparation of line staff evaluations; recommend discipline; implement discipline procedures as directed.

## PLACER COUNTY

### Revenue Services Supervisor (Page 2)

Supervise training activities of assigned work unit or section; train lead staff; ensure that new personnel are trained in the systems and procedures related to program functions including operation of systems used; troubleshoot problems and respond to questions and inquiries from other department staff.

Analyze program problems and refer significant failures to the proper source of service; consult with vendors regarding program equipment and techniques; coordinate vendor purchases; assist in systems analysis and make recommendations for efficiency.

Assure that subordinate staff understand and comply with all policies and procedures of the Revenue Services Division.

Work with department personnel and the public in the areas of assigned functional responsibilities.

Provide technical assistance on special projects for department and County management personnel.

Represent the Revenue Services Division to outside agencies and organizations as directed by higher level management staff; participate in outside community and professional groups and committees; provide technical assistance as necessary.

Research, collect data, and prepare statistical, technical and/or administrative reports as required; prepare written correspondence; participate in the preparation of procedural manuals for Revenue Services staff.

Assist staff with difficult situations, both on the phone and in person.

Answer questions and provide information to the public; investigate complaints and recommend corrective action as necessary.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Provide back-up support to the Revenue Services Manager as required.

Perform related duties as assigned.

## MINIMUM QUALIFICATIONS

### **Knowledge of:**

- Methods and techniques used for effective billing, collections and investigations for collection of current and delinquent accounts.
- Principles and practices of effective budgeting and personnel management.

PLACER COUNTY  
Revenue Services Supervisor (Page 3)

- Equipment, tools and materials used in an automated collections center.
- Principles, practices and operating characteristics of manual and computerized call-taking systems in a collections environment.
- Computer software, including word processing, database, spreadsheet and other related applications.
- Principles of supervision, training and performance evaluation.
- Principles and practices of leadership, motivation, and conflict resolution.
- Principles and practices of work safety.
- Pertinent local, state and federal laws, ordinances and rules.
- English usage, spelling, punctuation and grammar; arithmetic and basic mathematical calculations.
- Principles and practices of customer service and public contact.

**Ability to:**

- Organize, implement and direct the operations and activities of the Revenue Services Division.
- Plan, assign, supervise, and evaluate the work of assigned staff.
- Develop and provide staff training as needed; prepare understandable and concise program documentation for staff training materials.
- Interpret and apply pertinent County and department policies, procedures, rules, and regulations.
- Assist in the development and monitoring of an assigned program budget.
- Draft and recommend policies and procedures related to assigned operations.
- Perform complex administrative work.
- Perform several tasks at once and assign reasonable priorities to each task.
- Maintain an efficient, calm demeanor in handling adverse situations.
- Operate all collections equipment and systems.
- Communicate clearly and concisely, both orally and in writing.
- Gain cooperation through discussion and persuasion.
- Work with various cultural and ethnic groups in a tactful and efficient manner.
- Establish and maintain effective working relationships with those contacted in the course of work.

- On a continuous basis, sit at desk/console for long periods of time. Intermittently twist and reach office equipment; walk to obtain printer materials from printer; write or use keyboard to communicate through written means; verbally give instructions to officers in the field; lift light weight.

**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:

**Experience:**

Three years of increasingly responsible experience in accounts receivable or revenue billing with responsibilities for collecting delinquent accounts, including one year of lead or supervisory experience.

**Training:**

Equivalent to the completion of the twelfth grade preferably supplemented by college course work in business, administration, accounting, or a related field.

**License or Certificate:**

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

**ADMINISTRATIVE SERVICES DEPARTMENT  
REVENUE SERVICES DIVISION  
FY 15/16**

Revenue Services  
Manager  
#31315



Accounting Technician  
#31312

Sr. Admin Clerk  
#31310

Sr. Collection Agent  
#31309

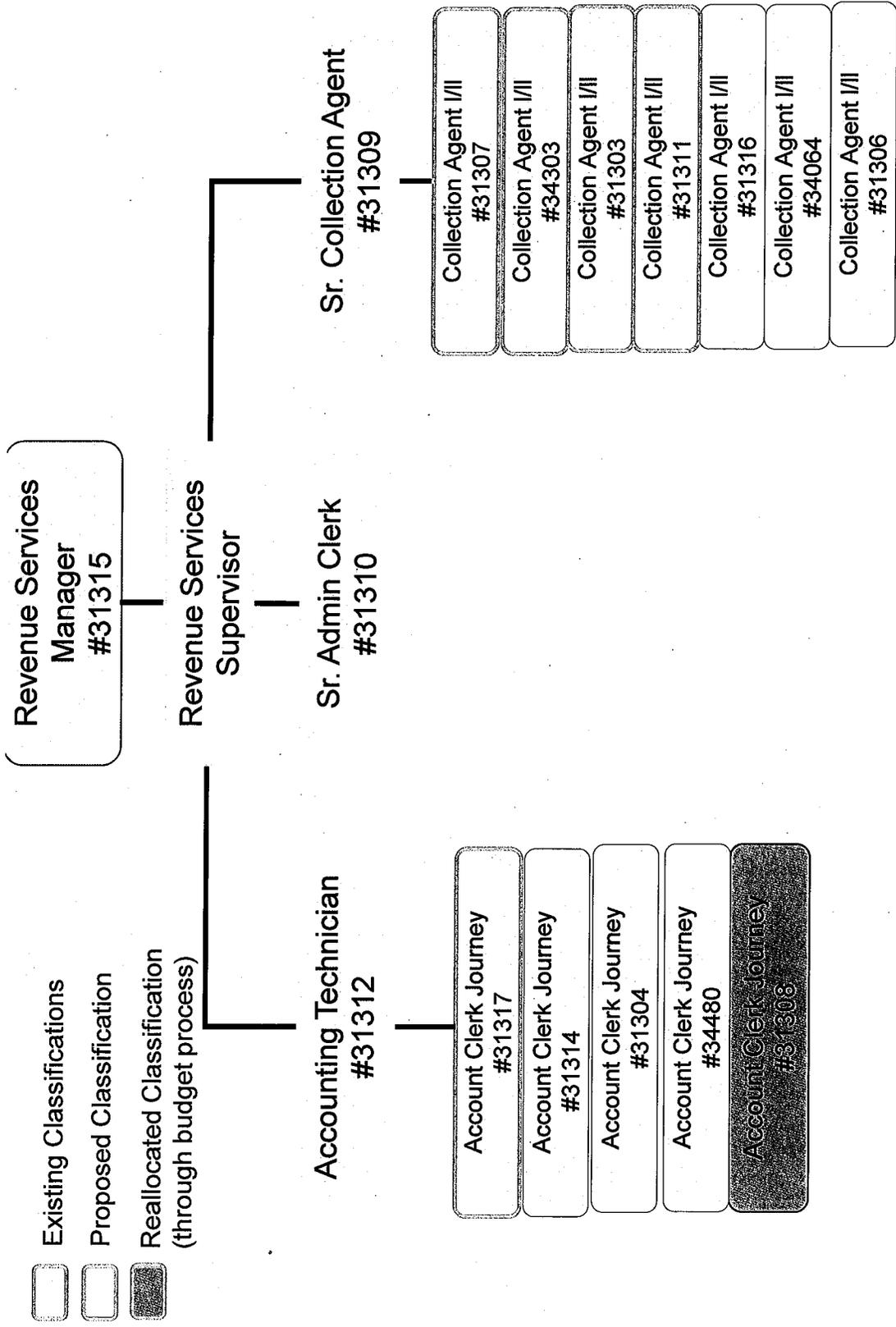
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- Account Clerk Journey #31314
- Account Clerk Journey #31304
- Account Clerk Journey #34480

1 – Admin Clerk  
Entry/Journey  
#31308  
Vacant/Unfunded

- Collection Agent I/II #31307
- Collection Agent I/II #34303
- Collection Agent I/II #31303
- Collection Agent I/II #31311
- Collection Agent I/II #31316
- Collection Agent I/II #34064
- Collection Agent I/II #31306

16 Positions

# ADMINISTRATIVE SERVICES DEPARTMENT REVENUE SERVICES DIVISION PROPOSED ORGANIZATIONAL CHART



- Existing Classifications
- Proposed Classification
- Reallocated Classification (through budget process)

17 Positions



# MEMORANDUM

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**DATE:** July 11, 2016  
**TO:** Civil Service Commission  
**FROM:** Lori Walsh, Human Resources Director  
**SUBJECT:** Review of Merit Increases for Eligible Classified County Employees

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During the closed session of your meeting, your Commission will review the performance evaluations of classified County employees pursuant to Government Code Section 54957. For those classified County employees determined to be eligible for a merit increase, the following motion is submitted for your consideration:

Motion to approve the classified merit awards set forth in the list dated **July 11, 2016**, pursuant to Section 3.04.650 of the County Code.