



## CIVIL SERVICE BOARD MEETING AGENDA

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**Date: March 21, 2019**

**OPEN SESSION 5:30 p.m.**

**City Hall, One Frank H. Ogawa Plaza, Hearing Room 1**

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**BOARD MEMBERS:** Chair, Andrea Gourdine; Vice Chair, Vacant; Lauren Baranco; Yvonne Hudson-Harmon; Christopher Johnson; Carmen Martinez; Beverly A. Williams

**STAFF TO THE BOARD:** Ian Appleyard, HRM Director/Secretary to the Board  
Greg Preece, HRM Manager/Staff to the Board  
Tabitha Pulliam, HRM Technician/Staff to the Board  
Michelle Meyers, Senior Deputy City Attorney

### OPEN SESSION AGENDA

#### ROLL CALL

#### 1) OPEN FORUM

#### 2) UPDATES, SECRETARY TO THE BOARD

INFORMATION

#### 3) APPROVAL OF THE MARCH 21, 2019 CIVIL SERVICE BOARD MEETING AGENDA

ACTION

#### 4) CONSENT CALENDAR:

ACTION

##### a) Ratification of Provisional Appointment

- Program Analyst II
- Public Works Maintenance Worker

##### b) Approval of Employee Requests for Leave of Absence

- Animal Services
- Fire Department
- Housing & Community Development
- Library

## c) Approval of Revised Classification Specification

- Accountant I & Accountant II
- Fire Marshal, Assistant (Non-sworn)

**5) OLD BUSINESS:**

- |   |             |
|---|-------------|
| a) Approval of January 17, 2019 Civil Service Board Meeting Minutes   | ACTION      |
| b) Determination of Schedule of Outstanding Board Items   | INFORMATION |
| c) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDE's and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21 | INFORMATION |
| d) Update on Common Class Study   | INFORMATION |

**6) NEW BUSINESS:**

- |   |        |
|---|--------|
| a) Approval of New Classification Specification for Manager, Housing Development and Approval of Exemption from the Provisions from Civil Service   | ACTION |
| b) Approval of Revised Classification Specification for Manager, Real Property Asset (formerly titled Manager, Real Estate Services) and Approval of Exemption from the Provisions from Civil Service | ACTION |
| c) Approval of New Classification Specification for Courier   | ACTION |
| d) Election of Civil Service Board Officers (Pursuant to Civil Service Rule 2.05)   | ACTION |

**CLOSED SESSION AGENDA****ROLL CALL**

*The Civil Service Board will Convene in Closed Session and will Report Out any Final Decisions in Open Session Before Adjourning the Meeting pursuant to California Government Code Section 54957.6:*

**1) Personnel Matter for Public Employee: 10.01 Appeal of Disciplinary Action: OCA-2018-AP01 (A. Finnell)**

Pursuant to California Government Code Section 54957 – Public Employee Discipline/Dismissal/Release *An appellant must notify the Civil Service Board in writing if she/he wishes to have a personnel matter heard in open session.*

## OPEN SESSION AGENDA

### 1) REPORT OF ACTIONS TAKEN IN CLOSED SESSION

### 2) ADJOURNMENT

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, April 18, 2019. All materials related to agenda items must be submitted by Thursday, April 4, 2019. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board  
150 Frank H. Ogawa Plaza, 2<sup>nd</sup> floor  
Oakland, CA 94612  
[civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov)



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) 或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



# MEMORANDUM

CITY OF OAKLAND

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**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board      **FROM:** Angelina DeMaria  
HR Analyst

**THROUGH:** Ian Appleyard, HRM Director  
Secretary to the Board

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment, Classification and Benefits

**SUBJECT:** Request for Provisional Appointment in Classification of Program Analyst II (selectively certified in Homelessness) to be ratified at the Civil Service Board Meeting of March 21, 2019

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Attached is a request from the Human Services Department to make a provisional appointment to a Program Analyst II (selectively certified in Homelessness) vacancy. The basis for this request is detailed in the attached Provisional Appointment Form as supporting documentation.

The Program Analyst II position program planning, research, analysis and development; writes grant proposals and submits applications; implements and monitors programs; prepares reports and drafts proposed programs; performs needs assessment; provides assistance to community organizations, district boards and citizen advisory bodies; provides lead direction to assigned staff; and performs related duties as assigned.

The minimum qualifications for Program Analyst II (selectively certified in Homelessness) are: Bachelor's degree in business or public administration, social work, behavioral sciences or a related field from an accredited college or university and three years of relevant experience of program administration in the areas of homeless prevention and affordable housing.

The selected candidate meets the minimum qualifications of the Program Analyst II (selectively certified in Homelessness) position with Bachelor's Degree in Literature and over 5 years of experience with Human Services programs including homeless programs, data systems (as well as a new system for City of Oakland homelessness programs) and data analysis. Recruitment and Classification is in the process of administering a Civil Service Examination to permanently fill this vacancy within 120 days. The job announcement was posted on February 11th, 2019.

The Human Resources Management Department recommends that the Civil Service Board ratify the provisional appointment for this Program Analyst II (selectively certified in Homelessness) position in the Human Services Department beginning on February 23, 2019 and ending on or before June 23, 2019.

**OAKLAND CIVIL SERVICE BOARD  
PROVISIONAL APPOINTMENT REQUEST**

**SCHEDULED MEETING DATE FOR CONSIDERATION:** March 21, 2019

**AREA REQUESTED**

POSITION: Program Analyst II (selectively certified in Homelessness)

DEPARTMENT: Human Services Department

APPOINTMENT DURATION: 120 days maximum

**STATUS OF RECRUITMENT AND EXAMINATION PROCESS**

**DATE ELIGIBLE LIST EXPIRED OR WAS EXHAUSTED:** n/a

**DATE PERSONNEL REQUISITION RECEIVED:** January 15, 2019

**CURRENT STATUS OF EXAMINATION:** The job announcement posted on February 11, 2019.

**JUSTIFICATION:**

Reason Needed:

This provisional appointment is needed to fill one (1) current vacancy. The requisition requesting the provisional appointment was approved. A provisional appointment will allow the work to be performed while an eligibility list is being developed. The Program Analyst II (selectively certified in Homelessness) is needed to research, design and support the implementation of new housing and homelessness interventions as well as participate in extensive collaborations with homeless/affordable housing providers, elected officials, non-profits, private sector and city and county departments.

Other Alternatives Explored and Eliminated:

None.

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**IMPACT IF REQUESTS ARE NOT APPROVED** (i.e., services, fiscal, other):

The negative impacts of not having this vacancy filled while an eligibility list is established would severely impact the Department's ability to implement the programs and services in the Community Housing (Homelessness) Program.

Attachments:

Recruitment and Classification Staff Recommendation, including following pertinent information:

- Summary of Application Qualifications ✓
- Current Residency Status: *Non - Oakland Resident*
- Current Employment Status: *Part-time Program Analyst II*



# MEMORANDUM

CITY OF OAKLAND

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**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Greg Preece  
Human Resources Manager

**THROUGH:** Ian Appleyard, HRM Director  
Secretary to the Board

**SUBJECT:** Request for Provisional Appointments in the Classification of Public Works Maintenance Worker to be ratified at the Civil Service Board Meeting of March 21, 2019

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Attached is a request from the Human Resources Management Department to approve selected provisional appointments to the Public Works Maintenance Worker classification as stipulated by the agreement made between the City of Oakland and SEIU, Local 1021. The basis for this request is detailed in the attached *Letter of Understanding Regarding Provisional Appointments* and the *Provisional Appointment Form* as supporting documentation.

The Public Works Maintenance Workers will perform a wide variety of maintenance duties in support of the Department of Transportation and the Public Works Department including street and traffic maintenance, construction and installation, sanitation services and weed abatement; and performs related duties as assigned. The minimum qualifications for a Public Works Maintenance Worker is one year of experience in construction and maintenance work. A list of candidates hired has been attached.

The selected candidates meet the minimum qualifications for the Public Works Maintenance Worker classification. The Recruitment team is in the process of administering a Civil Service Examination to permanently fill the open vacancies before the June 30, 2019 deadline per the Letter of Understanding. The job announcement will be posted no later than March 30, 2019.

The Human Resources Management Department recommends that the Civil Service Board ratify the provisional appointments for this Public Works Maintenance Worker position in the Public Works Department and the Department of Transportation beginning on March 08, 2019 and ending on or before June 30, 2019.

**OAKLAND CIVIL SERVICE BOARD  
PROVISIONAL APPOINTMENT REQUEST**

**SCHEDULED MEETING DATE FOR CONSIDERATION:** March 21, 2019

**AREA REQUESTED**

POSITION: Public Works Maintenance Worker

DEPARTMENTS: Public Works & Department of Transportation

APPOINTMENT DURATION: May exceed 120 days per agreement

**STATUS OF RECRUITMENT AND EXAMINATION PROCESS**

**DATE ELIGIBLE LIST EXPIRED OR WAS EXHAUSTED:** n/a

**DATE PERSONNEL REQUISITION RECEIVED:** Various dates from OakDOT and Public Works

**CURRENT STATUS OF EXAMINATION:** The job announcement for the provisional posted on December 17, 2018 and closed on January 14, 2019. The job announcement for the permanent position(s) will post no later than March 30, 2019.

**JUSTIFICATION:**

Reason Needed:

Provisional appointments made under this agreement are for filling several Public Works Maintenance Worker vacancies within the Departments of Public Works and Transportation. The City and SEIU agreed through the attached Letter of Understanding to allow for provisional appointments beyond the normal 120-day limit to allow vacancies to be filled while the Human Resources Management Department prepares for and conducts the recruitment.

Other Alternatives Explored and Eliminated:

None.

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**IMPACT IF REQUESTS ARE NOT APPROVED** (i.e., services, fiscal, other):

The negative impacts of not having these vacancies filled while an eligibility list is established would severely impact the Departments' ability to perform services.

Attachments:

Recruitment and Classification Staff Recommendation, including following pertinent information:

- Summary of Application Qualifications
- Letter of Understanding between City of Oakland and SEIU Local 1021

# LETTER OF UNDERSTANDING REGARDING PROVISIONAL APPOINTMENTS – EXHIBIT 4

## AGREEMENT BETWEEN THE CITY OF OAKLAND AND THE SERVICE EMPLOYEES INTERNATIONAL UNION, LOCAL 1021 (SEIU LOCAL 1021)

The City of Oakland and SEIU, Local 1021 enter into the following agreement regarding a limited expansion of provisional appointments in Public Works Maintenance Worker classification.

The Personnel Manual of the Civil Service Board states under Rule 5 – Certification and Appointment:

Section 5.06 – Temporary Appointments.

- (a) Provisional Appointments: A Department Head, with the approval of the Personnel Director, subject to ratification of the Board, may make provisional appointments, in the absence of an eligible list, for any position in which a vacancy may occur. No such provisional appointment shall continue after regular appointment from an eligible list, nor, in any event, shall such appointments continue for more than 120 calendar days. Provisional appointees may not be placed in permanent employment without successfully competing in a selection process.

In cases where the appointing authority desires to fill a vacancy by provisional appointment, candidates must be eligible to compete in the examination for that vacancy.

The City of Oakland and SEIU, Local 1021 agree to the following:

- Effective the date of this agreement, provisional appointments may be made to the classification of Public Works Maintenance Worker (PWMW) that exceed 120 days;
- The appointments shall not go beyond June 30, 2019;
- The City shall make its best efforts to make provisional appointments to the PWMW exclusively from current temporary part-time City of Oakland employees;
- The City shall consider and interview all interested Temporary Part-Time employees who meet minimum qualifications prior to considering outside candidates;
- All provisional appointments shall meet the minimum qualifications of the PWMW classification and shall be ratified by the Civil Service Board;
- The City shall open a recruitment for PWMW classification no later March 30, 2019; and
- All provisional appointees who have earned placement on the PWMW eligible list shall be certified as a group, regardless of rank on the eligible list, to the departments with vacancies in the PWMW classification.

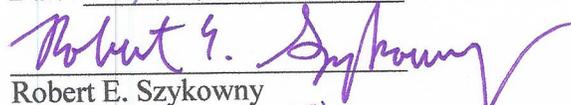
This Letter of Understanding shall expire June 30, 2019.

For SEIU, Local 1021



Felipe Cuevas, President

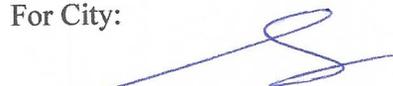
Date: 11/20/2018



Robert E. Szykowny

Date: 11/20/2018

For City:



Sabrina Landreth, City Administrator

Date: 11/20/18



Ian Appleyard, HR Director

Date: 11.20.2018

**PROVISIONALLY HIRED CANDIDATES**  
**March 21, 2019**

**Public Works:**

1. Jabari Bell
2. Phillip Duncan
3. Charles Ford
4. Corey Hopkins
5. Cameron Johnson
6. Roy Luster
7. Deniece Parm
8. Mako Verge
9. Tyrus Young

**OakDOT:**

1. Craig Griffin
2. Joseph Guerrero
3. Roberto Hernandez Vega
4. Tirrell Sanders
5. Jorge Diaz
6. Quintor Gonzalez
7. Alfonso Quintor
8. Victor Jimenez



# MEMORANDUM

**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Tabitha Pulliam, HRM Technician, Recruitment & Classification / Staff to the Board

**THROUGH:** Ian Appleyard, HRM Director / Secretary to the Board

**SUBJECT:** Request Authorization for Employee Requests for Leave of Absence

HRM is in receipt of five (5) Unpaid Leave of Absence requests pursuant to Personnel Manual Section 8.07 Miscellaneous Leaves of Absence.

<b>Employee Name</b>	<b>Classification</b>	<b>Department</b>	<b>Leave Duration</b>	<b>Category</b>
Fandinola, Benjamin	US&R Warehouse & Logistics Specialist	Fire Department	February 11, 2019 – February 15, 2019	CSR 8.07 (c)(iii) Personal Business
Johnson, Nia	Office Assistant II	Housing & Community Development	February 11, 2019 – June 30, 2019	CSR 8.07 (c)(v) Exempt Position
Martin, Amy	Librarian II	Library	July 08, 2019 – August 26, 2019	CSR 8.07 (c)(iii) Personal Business
Mitchell, Ashley	Animal Control Officer	Animal Services	January 24, 2019 – February 07, 2019	CSR 8.07 (c)(iii) Personal Business
Schiesser, Paul	Senior Librarian	Library	March 05, 2019 – March 09, 2019	CSR 8.07 (c)(iii) Personal Business

**RECOMMENDATION:**

Staff recommends that the Civil Service Board approve the requested Leaves of Absence.



# Unpaid Leave of Absence

### Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Parental Leave (no pay)

Employee's Name Benjamin Fandino Employee's ID \_\_\_\_\_ Today's Date 1/18/19

Department/Division Fire Department Employee Job Title USAR Warehouse & Logistics Specialist

Request: 5  Days  Hours From 2/11/19 To 2/15/19  
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year?  Yes  No If yes, what type of leave \_\_\_\_\_  
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
PNP	1 year	No	No	No*	Parental Leave (no pay)

**\* Additional Information**

Employees on ANP, MNP, SLV or PNP may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid parental, an employee may take up to a maximum of 5 months leave.

[Signature] \_\_\_\_\_  
 Employee's Signature Date 1/18/19

\_\_\_\_\_  
 Civil Service Board Approval Date

[Signature] \_\_\_\_\_  
 Department Head Approval Date 1/23/19

\_\_\_\_\_  
 City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.

Distribution: Original to DHRM Admin., Copy to HRIS Operations, Dept., and Employee





# Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Parental Leave (no pay)

Employee's Name Amy Martin Employee's ID 18107 Today's Date 1/25/19

Department/Division Library Employee Job Title Librarian II

Request: 35  Days  Hours From 7/8/19 To 8/26/19  
No. of Days or Hours      Select Days or Hours

Unpaid Leave Taken This Year?  Yes  No If yes, what type of leave \_\_\_\_\_  
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
PNP	1 year	No	No	No *	Parental Leave (no pay)

**\* Additional Information**

Employees on ANP, MNP, SLV or PNP may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid parental, an employee may take up to a maximum of 5 months leave.

Amy Martin  
Employee's Signature      1/25/19  
Date

\_\_\_\_\_  
Civil Service Board Approval      Date

[Signature]  
Department Head Approval      1/25/19  
Date

\_\_\_\_\_  
City Manager Approval      Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



# Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Parental Leave (no pay)

Employee's Name Ashley Mitchell Employee's ID 22342 Today's Date 01/28/19

Department/Division Animal Services Employee Job Title Animal Control Office

Request: 80  Days  Hours From 1/24/19 To 2/7/19  
No. of Days or Hours      Select Days or Hours

Unpaid Leave Taken This Year?  Yes  No If yes, what type of leave FMLA - Maternity  
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
PNP	1 year	No	No	No*	Parental Leave (no pay)

\* Additional Information

Employees on ANP, MNP, SLV or PNP may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid parental, an employee may take up to a maximum of 5 months leave.

Ashley Mitchell 1/28/19  
 Employee's Signature      Date

\_\_\_\_\_  
 Civil Service Board Approval      Date

[Signature] 1/30/19  
 Department Head Approval      Date

\_\_\_\_\_  
 City Manager Approval      Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.

Distribution: Original to DHRM Admin., Copy to HRIS Operations, Dept., and Employee



# Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Parental Leave (no pay)

Employee's Name Paul Schiesser Employee's ID 12658 Today's Date 02-05-19

Department/Division Library Employee Job Title Sr. Librarian

Request: 5  Days  Hours From 03-05-19 To 03-09-19  
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year?  Yes  No If yes, what type of leave \_\_\_\_\_  
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
PNP	1 year	No	No	No*	Parental Leave (no pay)

\* Additional Information

Employees on ANP, MNP, SLV or PNP may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid parental, an employee may take up to a maximum of 5 months leave.

02-05-19  
 Employee's Signature Date

\_\_\_\_\_  
 Civil Service Board Approval Date

2/9/19  
 Department Head Approval Date

\_\_\_\_\_  
 City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.

Distribution: Original to DHRM Admin., Copy to HRIS Operations, Dept., and Employee



# MEMORANDUM

**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of Revised Classification Specifications for Accountant I and II

Based upon a classification review at the request of the Finance Department, staff has proposed revisions to the **Accountant I and II** classification specifications. The classifications were approved in October 1995 and have not been revised since that time.

Both descriptions are being overhauled. The primary changes include the following:

- Inserting language in the Distinguishing Characteristics section to distinguish between accounting positions/levels.
- Updating the Examples of Duties.
- Revising the Knowledge and Abilities statements.
- Altering the Minimum Qualifications to add a substitution pattern that would allow for more Account Clerks to be eligible in the future to promote up to Accountant once they've obtained the necessary educational milestones.
- Adding flexible staffing from the Accountant I to II level so that the City's Flexible Staffing policy could apply to these two classifications.

The Service Employees International Union (SEIU, Local 1021) was notified of the proposed revised classification specifications. City staff and union representatives met in late 2018 and early 2019 on three occasions to discuss the proposed changes and potential impacts. Minor amendments were proposed during the January 28, 2019 meeting. Following discussion with City representatives, the City agreed to the union's proposed edits. Final agreement was reached at the meeting on February 25, 2019 when the union confirmed that they have no objections to the proposed revisions.

There are two Accountant I vacancies and four Accountant II vacancies. The City intends to move quickly to fill these critical vacancies and is in the process of beginning the recruitment processes for both levels.

Additionally, the "common class" status of these classifications was discussed at the Civil Service Board meeting on November 15, 2018. The "Common Class" Project is currently underway, and staff is awaiting further direction related to these two classifications.

**CIVIL SERVICE BOARD**

Subject: Accountant I and II Classification Specifications

Date: March 21, 2019

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Staff recommends that the Civil Service Board approve the proposed revisions to the **Accountant I and II** classification specifications.

**Attachments:** Revised draft Accountant I and II classification specifications.



**DRAFT**  
**2018--1-28**

# ACCOUNTANT I

**Class Code AF002**

**Civil Service Classified**

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## DEFINITION:

Under immediate supervision in City Departments, ~~To~~ performs ~~routine~~ entry level professional accounting work, to assist with maintenance and administration of the City's accounting systems; ~~related to~~ assists in the preparation and maintenance of municipal accounting records and reports; and ~~to~~ monitors financial records, grants, and contracts; and performs related duties as assigned.

## DISTINGUISHING CHARACTERISTICS:

This is an entry level classification in the professional accounting series whose incumbents perform routine professional accounting duties under close supervision. Assignments are analytical and evaluative in nature, requiring knowledge of the fundamental doctrines, theories, and terminology of accountancy. This classification ~~differs~~ is distinguished from the higher level Accountant II in that the latter works under limited supervision and performs more complex accounting tasks. It is further distinguished from the lower level Accounting Technician and Account Clerk classifications, which perform technical and clerical support accounting tasks of a relatively well-defined nature, requiring knowledge of bookkeeping systems and basic accounting principles.

The incumbent ~~R~~receives immediate supervision from an Accounting Supervisor, Accountant III, division manager, or other management staff.

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

Review and generate Budget Change Request (BCR) Forms and Journal Vouchers in compliance with accounting and grant requirements and city policies & procedures, including year-end processing.

Review and generate departments' requisitions, purchase orders, payments, and receivables for accuracy, including correct funding code information, appropriate supporting documentation, correct grant treatment and asset tagging, and compliance with City policies and procedures; research and analyze transactions to resolve problems.

Assist in monitoring and reconciling department or program budget, spending, revenues, labor distributions, payroll, grant accounting, etc. in compliance with all applicable federal, state, and city rules, regulations, and ordinances.

Make recommendations regarding proposed budget, expenditure, and account code adjustments, as needed.

Perform department grant accounting activities which include; processing, set-up, reconciling and reimbursement and annual reports in accordance with grant requirements, agreements, contracts, and state and federal guidelines.

~~Perform routine financial reporting, accounting, and auditing for a City department, bureau, division, or section, or redevelopment agency for a City department, bureau, division, or section.~~

~~Review of accounting documents to ensure accuracy of information and calculations; make correcting entries; examine supporting documents to establish proper authorization and conformance with agreements, contracts, and state and federal regulations.~~

Reconcile and analyze general ledger accounts to determine the accuracy of accounting records; prepare or adjust entries in records whenever necessary.

~~Maintain subsidiary accounting records.~~

~~Perform periodic reconciliations of subsidiary accounts, and bank statements; prepare journal entries.~~

~~Reconcile and analyze yearly receipts, expenditures, appropriations, and encumbrances of the appropriation system and related accounts in the general ledger; prepare transfers between funds.~~

Maintain financial records for special assessments; reconcile and maintain trust account records.

May prepare audit schedules for auditors; assist in the implementation of audit findings and report recommendations.

Assist in the design and development of accounting systems and processes, as needed.

Propose efficiencies and compliance improvements to financial systems and processes; help ensure accounting systems and processes conform with federal and state laws, generally accepted accounting principles, and City policies.

~~May write statistical and narrative reports; perform related duties as assigned.~~

## **QUALIFICATIONS: KNOWLEDGE AND ABILITIES**

Knowledge of:

- Generally Accepted Accounting Principles (GAAP), Governmental Accounting Standards Board (GASB), and the theory, practices and procedures of general accounting or auditing.;
- ~~and investment, commercial law, and legal terminology.~~
- ~~Applicable federal, state, and local legislation.~~
- Basic computer applications; and Operation of general office equipment, including 10-key calculator.
- Budget principles and terminology.
- Computer systems, automated accounting/financial systems, and software applications.

Ability to:

- Comply with Generally Accepted Accounting Principles and Governmental Financial Reporting Standards.
- Analyze, post, balance, and reconcile accounting records and financial statements.
- Research and analyze fiscal and statistical data; utilize problem solving and decision making skills; and verify accuracy of financial data and information.
- Ensure proper authorization and documentation for disbursements and other transactions.
- Communicate effectively in both oral and written form; and maintain accurate records; prepare clear, concise reports.
- Utilize computer systems and software applications including automated financial systems.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

### **EDUCATION AND EXPERIENCE: MINIMUM QUALIFICATIONS**

*Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.*

#### **Education:**

A Bachelor's degree from an accredited college or university in accounting, -finance, business administration, or a related field, which must have included at least 12 semester or 18 quarter units of coursework from among the following accounting courses: Intermediate Accounting to Advanced Accounting, Governmental Accounting or Auditing. Directly related work experience may be substituted for the educational requirement on a year-for-year basis, provide that the applicant has completed college level accounting coursework through the intermediate level.

Substitution: Increasingly responsible technical-clerical accounting experience may substitute for up to two (2) years of the required education on a year-for-year basis, provided that at least 12 semester units or equivalent units in accounting are completed per the coursework described above.

#### **Experience:**

None required.

### **LICENSE OR CERTIFICATE**

~~None required.~~ Possession of a Certified Public Accountant Certificate is desirable.

### **OTHER REQUIREMENTS**

May be required to pass a background investigation.

### **FLEXIBLE STAFFING**

Incumbents in the Accountant I classification are eligible to promote to the Accountant II classification in accordance with established City policy related to flexible staffing.

**DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY**

Established: 10/27/1995      CSB Resolution #: 44346      Salary Ordinance #:  
Exempted:    Y  N       Exemption Resolution #:

Revision Date:        /   /      CSB Resolution #:  
Re-titled Date:      /   /      CSB Resolution #:      Salary Ordinance #:

(Previous title(s):        )



## ACCOUNTANT II

**DRAFT**  
**2018-1-28**

Class Code: AF021

Civil Service Classified

### DEFINITION

Under general direction in ~~To~~ City Departments, performs moderate to difficult professional accounting and auditing tasks, including the design and preparation of accounting systems; prepares financial and statistical, ~~and narrative~~ reports; ~~to~~ analyzes, examines, interprets, and reconciles City accounting records; and ~~to~~ monitors financial records, grants, and contracts; ~~may provide lead direction to assigned staff; and performs related duties as assigned.~~

### DISTINGUISHING CHARACTERISTICS

This is a journey level classification in the professional accounting series. Incumbents are expected to independently perform ~~moderate to difficult~~ the full range of professional accounting duties ~~under limited supervision~~ and may provide lead direction to assigned staff on specific projects. This classification ~~differs~~ is distinguished from the higher level Accountant III in that incumbents of the latter may supervise ~~or direct~~ accountants or direct professional staff on projects and perform the most complex accounting duties. It is distinguished from the lower level of Accountant I, which works on assignments that are more limited in scope, using standardized application of well-established accounting principles and theories. It is further distinguished from the Accounting Technician and Account Clerk classifications, which perform technical and clerical support types of accounting tasks of a relatively well-defined nature.

### SUPERVISION RECEIVED AND EXERCISED

The incumbent ~~R~~receives general supervision from an Accounting Supervisor, Accountant III, division manager, or other management staff; ~~and M~~may provide lead direction to Accountant I and accounting technical or clerical staff.

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

Prepare revenue reports, statistical reports, expenditure forecast and management reports and educate department management on these areas; prepare trial balances and financial reports.

Prepare asset records to ensure that the City's assets lists are complete and correct; monitor and ensure departments' assets are appropriately placed in-service, as applicable.

Reconcile subsidiary ledgers to general ledger and fund control accounts for department.

Review and generate Budget Change Request (BCR) Forms and Journal Vouchers for appropriate supporting documentation and compliance with accounting and grant requirements and city policies and procedures, including year-end processing.

Review and generate department requisitions, purchase orders, payments, receivables, and supporting documentation for accuracy, including correct funding code information, appropriate supporting documentation, correct grant treatment, and asset tagging.

Perform and review department financial and budget analysis regarding sources of funding, tax revenue levels, and key trends in budgets.

Oversee department grant accounting activities which include; processing, setting up, reconciling, and reimbursement and annual reports in accordance with grant requirements, agreements, contracts, and state and federal guidelines.

Lead and prepare audit schedules and financial reports for department audits, or as requested by the Finance Department.

Lead the implementation of corrections for audit findings and report recommendations, as needed.

Provide input into the design and development of accounting systems and processes, as needed.

Ensure Department accounting practices conform with federal and state laws, generally accepted accounting principles, and City policies.

Assist in the preparation and administration of the division, section, or agency budget.

Exercise sound professional judgment in all accounting and financial matters

Perform financial reporting, accounting, and auditing for a City department, bureau, division, or section, or redevelopment agency.

Process and reconcile revenues, expenditures, and technical transactions for a department, in compliance with all applicable federal, state, and city rules, regulations, and ordinances.

Review accounting documents to ensure accuracy of information and calculations; make correcting entries; examine supporting documents to establish proper authorization and conformance with agreements, contracts, and state and federal regulations.

Prepare and maintain control and subsidiary accounting records involving a variety of transactions and accounts; prepare trial balances and financial reports.

Prepare journal entries and periodic reconciliations of general ledger, journal, subsidiary accounts, and bank statements, as needed.

Reconcile yearly receipts, expenditures, appropriations, and encumbrances of the appropriation system and related accounts in the general ledger; prepare transfers between funds.

Examine and interpret City accounting records for compliance with federal and state grants; prepare mandated annual grants reports.

~~Establish and maintain financial records for special assessments; issue trust account numbers; reconcile and maintain trust account records.~~

Provide lead direction, training and work review to a small accounting staff as assigned; organize, assign and review work; provide input into selection decisions, performance evaluations and disciplinary matters.

Maintain and update asset records; calculate and record amortization; of expenditures; delete fixed assets from appropriate accounts; calculate depreciation expense.

Prepare audit schedules for auditors; implement audit findings and report recommendations.

Reconcile investment activity, take daily bids, and monitor cash flow.

Prepare accounting spreadsheet using computer applications; instruct others in their use.

Review current accounting practices and procedures; recommend modifications and revisions.

May write statistical and narrative reports for City officials, external auditors and various agencies.

Perform financial and budget analysis to understand sources of funding, tax revenue levels and key trends in budgets, as needed.

Perform related duties as assigned.

### QUALIFICATIONS KNOWLEDGE AND ABILITIES

Knowledge of:

- Generally Accepted Accounting Principles (GAAP), Governmental Accounting Standards Board (GASB), and application of the practices and procedures of government fund accounting and auditing.
- Principles and practices of general, fund, and governmental accounting.
- ~~Investment, commercial law, and legal terminology.~~
- Applicable federal, state, and local legislation.
- Data collection and analysis methodologies; program, grants, and budget management.
- Policies and procedures related to the department or functional area to which assigned.
- Computerized systems, automated accounting/financial systems, and software applications;
- Budget principles and terminology.
- Principles and practices of ~~lead~~supervision and training.

Ability to:

- Comply with GAAP and government financial reporting standards.
- Plan, assign, direct, and review the work of others.
- Analyze, post, balance, and reconcile accounting records and financial statements.
- Interpret federal and state regulations pertaining to municipal governments.
- Verify the accuracy of financial data and information.
- Make sound independent judgements within established guidelines.
- Ensure proper authorization and documentation for disbursements and other transactions.
- Communicate effectively in both oral and written form.
- Utilize computer systems and software applications including automated accounting/financial systems.
- Maintain accurate records; prepare clear, concise reports.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

**EXPERIENCE AND EDUCATION MINIMUM QUALIFICATIONS**

~~Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:~~Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.

**Education:**

~~A Bachelor's degree from an accredited college or university in accounting, finance, business administration, or a related field, which must have included at least 12 semester or 18 quarter units of coursework from among the following accounting courses: Intermediate Accounting, to Advanced Accounting, Governmental Accounting or Auditing required. Directly related work experience may be substituted for the educational requirement on a year for year basis, provided the applicant has completed college level accounting course work beyond the intermediate level.~~

Substitution: Professional accounting experience may substitute for up two (2) years of the required education on a year-for-year basis, provided that at least 12 semester units or equivalent units in accounting are completed.

**Experience:**

~~Two (2) years of increasingly responsible professional accounting experience that is comparable to an Accountant I in the City of Oakland. Governmental accounting experience desired per the coursework described above.~~

**LICENSE OR CERTIFICATE**

~~None required~~Possession of a Certified Public Accountant Certificate is desirable.

**OTHER REQUIREMENTS**

May be required to pass a background investigation

**FLEXIBLE STAFFING**

Incumbents in the Accountant I classification are eligible to promote to the Accountant II classification in accordance with established City policy related to flexible staffing.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY
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Established: 10/27/1995	CSB Resolution #: 44346	Salary Ordinance #:
Exempted: Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:	
Revision Date: / /	CSB Resolution #:	
Re-titled Date: / /	CSB Resolution #:	Salary Ordinance #:
(Previous title(s): )		

Civil Service Board: # 44346  
Date Approved: 10/27/95  
Date Revised:



CITY OF OAKLAND

## MEMORANDUM

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**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of Revised Classification Specification for Fire Marshall, Assistant  
(Non-Sworn)

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Based upon a classification review at the request of the Oakland Fire Department, staff has proposed revisions to the **Fire Marshall, Assistant (Non-Sworn)** classification specification. The classification specification was approved in March 2014 and has not been revised since that time.

There is also a sworn Fire Marshal, Assistant classification, which is represented by the International Association of Fire Fighters (IAFF, Local 55). The Civil Service Board adopted revisions to that classification at its November 15, 2018 meeting. The City makes every effort to ensure that the sworn and non-sworn classification specifications mirror each other as much as possible, with the exception that non-sworn incumbents cannot engage in fire suppression activities.

The following proposed changes are intended to align with the recent changes to the sworn classification specification and better reflect the assigned duties per the interim Fire Marshal:

1. Add references to commercial inspections and re-order references to investigations and vegetation management to lower in the rank order.
2. Amend the Distinguishing Characteristics section to correct the reporting structure.
3. Add several new task statements, delete and/or shift the order of others, and convert several task statements to “may.”
4. Add commercial and residential inspections and vegetation management to the Knowledge statements; add new Ability statements.
5. Increase the required years of experience from three to four, add additional qualifying domains to ensure relevant background experience, and specify that two years of supervisory experience is highly desirable.
6. Under License and Certificate, communicate that a valid driver’s license must be maintained throughout employment. Rephrase language pertaining to possession of the ICC Fire Inspector Certification I and state that it must be renewed before it expires each term.

There is one filled position. The approved classification specification will be used to initiate future recruitment and selection processes, when needed.

**CIVIL SERVICE BOARD**

Subject: Fire Marshal, Assistant (Non-Sworn) Classification Specification

Date: March 21, 2019

Page 2

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The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification revisions. City staff and union representatives discussed the potential impacts at three meetings from December 2018 through February 2019. In an email dated March 14, 2019, the union confirmed that there are no objections to the proposed revisions.

Additionally, the Port does not operate any fire services programs. Therefore, classifications specifically designed for that program have no corresponding classification at the Port. This classification is not being considered as part of the "Common Class" Project that is currently underway.

Staff recommends that the Civil Service Board approve the proposed revisions to the **Fire Marshal, Assistant (Non-Sworn)** classification specification.

**Attachments:** Revised draft Fire Marshal, Assistant (Non-Sworn) classification specification.



## FIRE MARSHAL, ASSISTANT (Non-Sworn)

Class Code: MA148 (Non-Sworn) Civil Service Classified

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### **DEFINITION**

Under general direction in the Oakland Fire Department, plan, organize, assist and direct day-to-day activities within the Fire Prevention Division which is responsible for fire prevention, ~~investigation~~ and commercial inspections. The Non-Sworn Assistant Fire Marshal performs a variety of administrative, technical and supervisory tasks related to ~~vegetation management~~, environmental hazards, fire code inspection, ~~fire investigation~~ and engineering services, which may include vegetation management and fire investigation; and performs other related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS**

This is a supervisory-level classification in public safety. The Non-Sworn Assistant Fire Marshal is a supervisor who exercises independent judgment in interpreting complex code requirements. This classification is distinguished from the higher level Fire Marshal in that the latter has responsibility for directing the activities of the Fire Prevention Division.

The ~~Non-Sworn Assistant Fire Marshal incumbent~~ receives direction from the Fire Marshal, ~~and may provides~~ supervision to Fire Prevention Bureau Inspectors, and may provide supervision to the Vegetation Management Supervisor, Fire Investigators, Fire Protection Engineers, and other professional, technical, and support staff as assigned. The Non-Sworn Assistant Fire Marshal is not expected to participate in fire suppression activities.

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

Plan, organize, assist and direct day-to-day activities in a division within the Fire Prevention ~~Bureau~~Division; responsible for formulating and interpreting policies and procedures; assist with developing goals and objectives; supervise and train staff, which may include assigned sworn fire personnel; provide data for developing and administering a division budget; develop and review reports; represent the department in public forums.

Oversee Fire Department commercial and vegetation inspection programs; inspect existing structures for fire code and vegetation standards; participate in the review and evaluation of construction plans for code compliance; inspect construction and remodel sites for compliance with fire codes; confer with property and business owners, contractors and appropriate staff to resolve compliance problems.

Prepare written reports citing code violations and fire hazards; recommend corrective actions; conduct follow-up inspections to determine if corrective actions have been taken; issue warnings notice of violations and citations for fire code violations; issue burn permits; renew fire code permits.

~~Oversee Certified Unified Program Agency (CUPA) program, hazardous material management and environmental protection programs; assist in the development of the hazardous material business plan; implement the hazardous waste inspection program; administer the California Accidental Release program; enforce the tiered permitting for hazardous waste treatment; inspect underground/aboveground storage tanks, monitor equipment and inventory records; enforce creek and stormwater protection regulations.~~

~~May c~~Coordinate fire related code review and approval of occupancy permits and business licenses with building officials; ~~assist in calculating water fire flows for building requirements.~~

~~Conduct~~ May oversee the inspection of hydrants, sprinkler systems and other fire extinguishing and protection tools/systems.

May plan, develop, implement, and direct a wild land urban interface fire protection program within the Wildfire District.

May oversee and manage the vegetation management and commercial inspection programs; develop training, standard operating procedures, and educational materials for the vegetation management and commercial inspection programs.

Plan, develop, and coordinate a vegetation recycling program to assist homeowners in reducing the fuel load on their property, including curbside chipping and fuel reduction.

May oOversee the investigation of major fires, fires of suspicious origin or those which involve loss of life; search fire scene for physical evidence.

Plan, schedule, support, and participate in providing a broad range of public education presentations to groups and individuals in fire prevention-, suppression, and training in fire safety and emergency planning including talks, demonstrations fuel reduction, and presentations before community groups, schools and other organizations or institutions ~~vegetation management.~~

Provide information to the public and promote goals and objectives related to wild land fire prevention.

~~Prepare written reports citing code violations and fire hazards; recommend corrective actions; conduct follow up inspections to determine if corrective actions have been taken; issue warnings and citations for fire code violations.~~

Plan and implement public education programs designed for groups such as neighborhoods, schools, churches, and homeowner associations.

Assist in the development of the division budget; make recommendations that affect allocation of resources; make expenditures decisions once the budget has been approved; monitor and track the budget; data collection and organization of budget material.

Provide data regarding fire inspection or prevention activities; assist in preparing a variety of reports regarding fire inspection and prevention.

Investigate citizen complaints as they relate to division personnel and code enforcement activities.

Assist in the development of fire prevention policies, procedures, and codes.

Assign, review, participate in, and coordinate the work of subordinate staff; supervise and train subordinate staff; conduct performance evaluations and carry out disciplinary action as necessary; participate in the selection of new employees.

~~Investigate citizen complaints as they relate to division personnel and code enforcement activities.~~

Operate a vehicle in the performance of assigned duties.

### **KNOWLEDGE AND ABILITIES**

Knowledge of:

- Principles, practices, and techniques of public administration, organization, operations, and fiscal management.
- Laws, ordinances, and regulations relating to the management of service delivery and support programs.
- Administrative principles and methods, including goal setting, program development, and implementation.
- Principles and practices of budget development and administration.
- Contract negotiation and administration.
- Federal, state and local funding sources and grant application procedures.
- Principles, practices, and techniques of human resource management including supervision and personnel development.
- Principles, practices, and techniques of fire prevention and suppression; code enforcement; commercial and residential inspection; hazardous materials use, handling, storage, and disposal; and vegetation management.
- Principles and techniques of promotion, marketing, customer service, education, and public relations.
- Computer systems, applications, mobile devices, and emergency communications
- Safety procedures and techniques.

Ability to:

- Implement and apply goals, objectives, policies, procedures, complex rules, regulations, laws, and ordinances.
- Enforce the Uniform Fire Code and Building Code.
- Utilize instruction manuals and maps.
- Read and interpret building plans.
- Accurately and effectively enforce laws, ordinances, and regulations relating to arson and hazardous materials incidents.
- Evaluate programmatic, administrative, and operational systems.
- Prepare and analyze complex reports, correspondence and other written materials.
- Use computers applications, software programs and other electronic devices.
- Analyze complex situations, problems, and data and use sound judgment in drawing conclusions and making decisions.
- Safely operate automotive vehicles in the performance of the assigned duties.
- Supervise and direct subordinate professional and support staff.
- Interpret and enforce administrative/operational policies, practices, and procedures.
- Maintain departmental standards and procedures.

- Work an irregular schedule including early mornings, evenings, and weekends.
- Oversee inspection and plan review teams and manage multiple projects.
- Establish effective working relationships with individuals, organizations, City Council, Mayor, City Administrator, boards and commissions, staff, city agencies, departments and offices.
- Communicate effectively and persuasively in both oral and in written forms.
- Prepare complex reports, correspondence, and other written materials, including official reports.
- Conduct training sessions and make verbal presentations to small groups.
- Determine and establish priorities, set standards, and provide guidelines.
- Provide strong leadership, initiative, and drive and creative and flexible problem-solving skills.
- Negotiate and administer a variety of contracts.
- Work effectively with ethnically diverse constituencies; be sensitive to political and cultural issues and concerns.
- Provide staff training and conduct performance appraisals.
- Correctly apply technology as required on the job.

**MINIMUM QUALIFICATIONS**

*Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.*

**Education:**

~~Graduation from an accredited college with an associate's~~ An Associate's degree in fire science, public or business administration or closely related field.

**Experience:**

~~Three~~ Four (4) years of progressively responsible professional experience in fire prevention, suppression, inspection, code enforcement, investigation, personnel and, fire education or training. ~~Lead or Two (2) years of~~ supervisory experience is highly desirable.

**LICENSE AND CERTIFICATE**

Possession of a valid California Class "C" or higher driver's license issued by the Department of Motor Vehicle (DMV). Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment.

Must possess a valid California International Code Council (I.C.C) Fire Inspector I Certification prior to the completion of probation within six months of employment or hire and maintain possession by renewing the certification on or before the expiration date.

**OTHER REQUIREMENTS**

Must be eighteen (18) years of age or older by the application closing date.

Must pass a thorough background investigation that complies with the background clearance of

**Fire Marshal, Assistant (Non-sworn)**

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI).

May be required to pass an employment physical examination.

Must be a U.S. citizen or legally authorized to work in the United States.

Must have an acceptable driving record.

**DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY**

Established: 03/20/2014      CSB Resolution #: 44709      Salary Ordinance #:  
Exempted:    Y  N       Exemption Resolution #:

Revision Date:    /   /      CSB Resolution #:  
Re-titled Date:    /   /      CSB Resolution #:      Salary Ordinance #:

(Previous title(s):



## CIVIL SERVICE BOARD MEETING MINUTES - DRAFT

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**Date: January 17, 2019**

**OPEN SESSION 5:30 p.m.**

**City Hall, One Frank H. Ogawa Plaza, Hearing Room 1**

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**BOARD MEMBERS:** Chair, Andrea Gourdine (Absent); Vice Chair, Vacant; Lauren Baranco; Yvonne Hudson-Harmon; Christopher Johnson (Arrived 5:35); Carmen Martinez; Beverly A. Williams

**STAFF TO THE BOARD:** Ian Appleyard, HRM Director/Secretary to the Board  
Greg Preece, HRM Manager/Staff to the Board  
Tabitha Pulliam, HRM Technician/Staff to the Board  
Michelle Meyers, Senior Deputy City Attorney

### OPEN SESSION AGENDA

#### ROLL CALL

##### 1) OPEN FORUM:

No speakers

**1a) Updates: Secretary to the Board** – General Recruitment and Classification Updates; Vice Chair David Jones no longer in hold-over status.

Notes:

- Ian Appleyard, Secretary to the Board, proposed adding an item, Agenda Approval, to the monthly agenda.
- The Board will appoint a new Vice Chair at the February 21, 2019 meeting.

##### 2) CONSENT CALENDAR:

- a) Ratification of Provisional Appointment
  - Urban Economic Analyst IV, Projects, PPT
- b) Approval of Employee Requests for Leave of Absence

- City Administrator
- City Attorney
- Human Services

c) Approval of Revised Classification Specifications

- Park Supervisor I and Tree Supervisor I
- Enforcement Chief, Public Ethics Commission (formerly titled Deputy Director, Public Ethics Commission)

**44916 A motion was made by Board Member Baranco and seconded by Board Member Martinez to approve the Ratification of Provisional Appointment, the Requests for Leave of Absence and the Revised Classification Specifications. The motion passed unanimously.**

**Votes:** Board Member Ayes: 5 – Baranco, Hudson-Harmon, Johnson, Martinez, Williams

Board Member Noes: None  
Board Member Abstentions: None  
Board Members Absent: Gourdine

**3) OLD BUSINESS:**

a) Approval of November 15, 2018 Civil Service Board Meeting Minutes

**44917 A motion was made by Board Member Johnson and seconded by Board Member Baranco to approve the November 15, 2018 Civil Service Board Meeting Minutes. The motion passed unanimously.**

**Votes:** Board Member Ayes: 5 – Baranco, Hudson-Harmon, Johnson, Martinez, Williams

Board Member Noes: None  
Board Member Abstentions: None  
Board Members Absent: Gourdine

b) Determination of Schedule of Outstanding Board Items

*Report received and filed*

c) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

*Report received and filed*

d) Update on Common Classification Study

*Report received and filed*

Note: Acting Chair Hudson-Harmon requested that the item *Update on the Common Classification Study* remain on the agenda until a determination has been made.

- Staff to the Board, Greg Preece, requested that the Board develop policy direction options for the Human Resources Department to consider in regard to the common classes
- The Board requested that Koff & Associates return with a more comprehensive study on the common classifications
- Michelle Meyers, Attorney to the Board, requested that the Secretary to the Board survey other jurisdictions that may have similar City to Port relationships and common classes

**4) NEW BUSINESS:**

- a) Approval of a New Classification Specification for Assistant Director, Planning and Building and Approval of the Exemption of the Classification from the Provisions of Civil Service Pursuant to Charter Section 902(f)

**44918 A motion was made by Board Member Johnson and seconded by Board Member Baranco to approve the November 15, 2018 Civil Service Board Meeting Minutes. The motion passed unanimously.**

**Votes:** Board Member Ayes: 5 – Baranco, Hudson-Harmon, Johnson, Martinez, Williams

Board Member Noes: None  
Board Member Abstentions: None  
Board Members Absent: Gourdine

- b) Quarterly Report per Section 3.04(f) of the Personnel Manual of the Civil Service Board (“Civil Service Rules”) Providing Status of All Classification Specification Revisions Currently Under Review

*Report received and filed*

**5) ADJOURNMENT**

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, February 21, 2019. All materials related to agenda items must be submitted by Thursday, February 7, 2019. For any materials over 100 pages, please also submit an electronic copy of all materials.

Agendas are available 72 hours in advance of the next meeting and may be viewed at the City Clerk’s Office, #1 Frank H. Ogawa Plaza, 1<sup>st</sup> Floor. Materials are also available on the City’s website at: <https://www.oaklandca.gov/boards-and-commissions/civil-service-board>.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board  
150 Frank H. Ogawa Plaza, 2<sup>nd</sup> floor  
Oakland, CA 94612  
[civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov)



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) 或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



**CIVIL SERVICE BOARD  
 APPEALS & HEARINGS CALENDAR  
PENDING LIST – March 21, 2019**

**1. OPEN**

Case Number	Classification	Dept.	Action Pending	Hearing Date	Notes/Next Steps
CAO-2018-AP01	Interim Director Oakland Police Commission	City Administrator	10.01 – Appeal of Disciplinary Action	March 21, 2019	
PBD-2019-AP01	Process Coordinator II	Planning & Building	4.0 – Appeal of Recruitment & Examination Process	Scheduled for June 20, 2019	
OPD-2019-AP01	Police Records Specialist	Oakland Police Department	6.06 – Appeal of Removal or Demotion of Employee During the Probationary Period	Tentatively Scheduled for May 16, 2019	
RMB-2019-AP01	Meter Collection Supervisor	Revenue & Management Bureau	6.06 – Appeal of Removal or Demotion of Employee During the Probationary Period	Tentatively Scheduled for April 18, 2019	

**2. OTHER PENDING ITEMS**

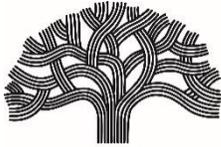
Date Requested	Subject	Report From	Date Due

**3. CLOSED**

Case Number	Classification	Dept.	Action Pending	Date Received	Notes

**4. UNDER REVIEW**

Case Number	Classification	Dept.	Action Pending	Action Date	Notes



CITY OF OAKLAND

# ***STAFF REPORT***

**DATE:** March 21, 2019

**TO:** THE HONORABLE CIVIL SERVICE BOARD

**FROM:** Greg Preece, HR Manager, Staff to the Board

**THROUGH:** Ian Appleyard, HR Director, Secretary to the Board

**SUBJECT:** TEMPORARY EMPLOYEES – Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of All ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

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## **SUMMARY**

Staff has prepared this report to provide the Civil Service Board with an update on compliance with the Civil Service Rules related to temporary employees since the last report at the January 17, 2019 meeting that referenced data as of December 28, 2018. This report focuses on temporary employees in the categories of Exempt Limited Duration Employees (ELDEs) and Temporary Contract Service Employees (TCSEs), who are currently employed in the City of Oakland.

As of February 22, 2019, there are a total of seventy-five (75) employees in the TCSE (19), TCSE/Annuitant (28), and ELDE (28) categories. Nine (9) assignments were closed, and thirteen (13) new assignments were added. Of the total, there is one (1) assignment reported as non-compliant with Rule 5.06.

Reports showing all the temporary assignments discussed in this report are included in a list (*Attachment A*) and a chart of trends (*Attachment B*) attached to this narrative report to provide a snapshot of the overall changes month to month.

## **BACKGROUND**

The use of temporary employees is allowed under Civil Service Rule 5 (Certification and Appointment) in recognition that standard Civil Service employment practices can be cumbersome when a time-sensitive assignment arises or existing resources do not fit a specific need. Pursuant to the Civil Service Rules, Section 5.06 governing temporary assignments, ELDE assignments may not exceed one year and TCSE assignments may not be “ongoing or repetitive.”

**STATUS OF NONCOMPLIANT ASSIGNMENTS**

Of the total seventy-five (75) temporary assignments, we are reporting one (1) in this period as out of compliance with Rule 5.06.

**RECOMMENDATION**

Staff recommends that the Civil Service Board accept the monthly report on temporary assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs).

For questions regarding this report, please contact Greg Preece, Recruitment & Classification at (510) 238-7334.

Attachments:

- A. TCSE/ELDE Report: For Payroll Reporting February 22, 2019.
- B. TCSE/ELDE Compliance Trend Chart: As of February 22, 2019.

**CIVIL SERVICE BOARD**  
**March 2019 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
<b>CLOSED THIS PERIOD (9)</b>								
CITY ADMINISTRATOR	Dalmasso	Jennifer	02491 - Oakland Animal Services	5/19/2018	TCSE/ Annuitant	0	Temporary on-call Veterinarian until premise license and DEA permit for shelter are transitioned	SEPARATED
CITY ADMINISTRATOR	Swanson	Luke	02111 - Communications Unit	11/20/2017	TCSE	724	Temporary project: Oakland Design League - to build the City's new website	SEPARATED
FIRE DEPARTMENT	Weisgerber	William	20311 - Fire Marshal's Office Unit - separated	5/7/2018	TCSE/ Annuitant	914	Temporary assistance until Fire Marshal is appointed	SEPARATED
HOUSING & COMMUNITY DEV.	Henderson	Troy	89939 - Municipal Lending	8/11/2018	TCSE	967	Temporary assignment to cover the duties of employee out on leave	PERMANENT
HUMAN RESOURCES	Delgado	Jeanette	05211 - Employment & Classification Unit	12/31/2018	TCSE	127	Temporary assignment to assist with multiple time-sensitive projects in the Benefits Unit.	SEPARATED
INFORMATION TECHNOLOGY	Harrison	Kevin	46111 - Administrative Services	10/1/2018	TCSE	523	Temporary project to provide expert guidance in maintaining the integrity and security of network operations, back-ups and disaster recovery.	PERMANENT
PUBLIC WORKS	Combs	Jocelyn	30111 - Director & Human Resources Unit	12/16/2017	TCSE/ Annuitant	181	Temporary support to help develop and facilitate Department Strategic Action Plan	SEPARATED
PUBLIC WORKS	Ferguson	David	30611 - Bureau Facilities & Environment	1/13/2018	TCSE/ Annuitant	836	Assistant Director - Short term management of the Bureau of Facilities and Environment.	PERMANENT
FINANCE	Misgun	Lula	08111 - Finance/Admin Unit	6/18/2018	TCSE/ Annuitant	937	Temporary support for Executive Assistant out on leave.	SEPARATED
<b>NEW THIS PERIOD (13)</b>								
CITY ATTORNEY	Ericsson	Kristin	04111 - City Attorney Administration	1/14/2019	TCSE/ Annuitant	202	Temporary Support for Legal Administrative Assistant out on leave	COMPLIANT
CITY AUDITOR	Edmonds	Michael	07111 - City Auditor Unit	1/12/2019	TCSE	103	Assistant City Auditor; temporary assistance in peer review preparation and training staff	COMPLIANT
DEPT. OF TRANSPORTATION	Calabrese	Christine	35232 - Street Lighting Engineer	2/9/2019	TCSE/ Annuitant	40	Temporary assistance to complete AC Transit Bus Rapid Transit project.	COMPLIANT
DEPT. OF TRANSPORTATION	Corona Jr.	Manuel	35214 - Complete Clean Streets	1/26/2019	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
FINANCE	Duperval	Shela	08421 - Revenue Audit Unit	2/13/2019	TCSE	52	Temporary receptionist assistance during high volume tax renewal season	COMPLIANT
FINANCE	Raines-Austin	Helen	08921 - Revenue Audit Unit	3/4/2019	TCSE		Temporary assistance to help maintain critical operations in the Parking Citations Assistance Center	COMPLIANT
FINANCE	Richards	Alexander	08921 - Revenue Audit Unit	3/8/2019	TCSE		Temporary assistance to help maintain critical operations in the Parking Citations Assistance Center	COMPLIANT
FINANCE	Smith	Starr	103242 - Parking Citation Assistance Center	1/18/2019	ELDE		Urgent temporary assignment on special projects in support of Public Service Reps	COMPLIANT
HUMAN SERVICES	Ukagumaoha	Jahswill	78111 - DHS Administration Unit	2/11/2019	ELDE		Temporary funded HEAP Program; implement and administer major housing development and direct outreach to homeless encampments; develop emergency housing programs	COMPLIANT
HOUSING & COMMUNITY DEV.	Johnson	Nia	89969 - Residential Rent Arbitration	2/9/2019	ELDE		Temporary, critical support in the operations of the Rent Adjustment Program.	COMPLIANT
POLICE	Bazile	Luc	106210 - Police Personnel	1/12/2019	ELDE		Temporary, urgent support as departmental Mail Courier; duties not yet fully defined	COMPLIANT
POLICE	DeSalvo	Barbara	108630 - Cease Fire	12/31/2018	ELDE		Grant funded temp assistance to develop strategic and sustainable project implementation plans; adopt best practices and policies.	COMPLIANT

**CIVIL SERVICE BOARD**  
**March 2019 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
POLICE	Long	Jacqueline	108630 - Ceasefire	12/31/2018	ELDE		Temporary assistance to complete the OPD Ceasefire Unit Project	COMPLIANT
<b>COMPLIANT (61)</b>								
CITY ADMINISTRATOR	Griffin	Bendu	02621 - Employment Services	4/21/2018	ELDE		Temporary support to assist department with project close out phase	COMPLIANT
CITY ADMINISTRATOR	Kwan	Jennifer	02491 - Oakland Animal Services	5/12/2018	TCSE	109	Temporary part time Veterinarian to supplement and add capacity to service delivery	COMPLIANT
CITY ADMINISTRATOR	Mufarreh	Chris	02491- Oakland Animal Services	4/23/2018	TCSE/ Annuitant	352	Temporary on-call Manager	COMPLIANT
CITY CLERK	Abney	Michelle	03121 - Office of the Clerk	5/30/2018	TCSE/ Annuitant	709	Temporary support of the Hotel Labor and Youth Services measures.	COMPLIANT
CITY COUNCIL	Lopes	Joyce	00011 - Council Administration Unit	10/4/2016	TCSE/ Annuitant	42	Filling in for Council staff out on leave	COMPLIANT
CONTROLLER - FINANCE	Bhatnager	Amit	08211 - Accounting Administration Unit	1/8/2018	TCSE	719	Temporary project to develop Oracle Business Intelligence Enterprise Edition and Oracle Business Intelligence Applications.	COMPLIANT
DEPT. OF TRANSPORTATION	Brown	Brytane	35214 - Complete Streets Planning & Project	12/29/2018	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
DEPT. OF TRANSPORTATION	Grant	Surlene	35111 - Director's Office	1/29/2018	TCSE	261	Temporary project to develop & implement a Public Outreach Strategy for the Capital Improvement Program (CIP).	COMPLIANT
DEPT. OF TRANSPORTATION	Kattchee	Susan	35241 - Safe Streets Administration	12/15/2018	TCSE/ Annuitant	181	Temporary assignment to support and train section leaders, assist with budget planning and implementation for 2019-2021	COMPLIANT
DEPT. OF TRANSPORTATION	Neary	Michael	35211 - Department of Transportation	5/21/2018	TCSE/ Annuitant	358	Temporary assistance to develop, manage and implement the GoPort Program (transportation improvement)	COMPLIANT
DEPT. OF TRANSPORTATION	Ortiz	Julieth	35211 - Great Streets Delivery Administration	8/11/2018	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
DEPT. OF TRANSPORTATION	Phan	Hank	35245 - Bicycle & Pedestrian Program	4/7/2018	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
DEPT. OF TRANSPORTATION	Phillips	Eva	35242 - Complete Streets Maintenance	12/15/2018	TCSE	217	Temporary project to evaluate/analyze the impacts of new mobility modes of transportation	COMPLIANT
DEPT. OF TRANSPORTATION	Pond-Danchik	Noel	35245 - Safe Streets Division-Bicycle & Pedestrian Program	11/3/2018	ELDE		Temporary assignment to assist in the implementation of the Bicycle & Pedestrian Program/Safe Streets	COMPLIANT
ECON & WORKFORCE	Kidder	Sarah	85511 - Cultural Arts & Marketing	6/17/2017	TCSE	58	Temporary project support in the Film Office.	COMPLIANT
ECON & WORKFORCE	Shahzada	Irfan	85111 - Admin: Economic & Workforce Development	5/5/2018	ELDE		Spec under revision for Accountant II; duties not yet fully defined.	COMPLIANT
FINANCE	Macias	Dalia	08211 - Accounting Administration Unit	1/26/2019	ELDE		Temporary project to assist with clean-up of Capital Projects and vendor data.	COMPLIANT
FINANCE	Treglown	Donna	08111 - Finance/Controller	6/18/2018	TCSE/ Annuitant	800	Temporary assistance to complete Capital projects and end of year fiscal reconciliations.	COMPLIANT
FINANCE/TREASURY	Poon	Natalie	08741 - Treasury Payroll	12/1/2018	ELDE		Temporary support for Human Resources Operations Tech out on leave.	COMPLIANT
FIRE DEPARTMENT	Fairley Summers	Helen Marie	20241 - Fire Communications Unit	8/11/2018	TCSE/ Annuitant	542	Temporary assistance to train new Fire Communication Dispatchers and special project related to on-boarding and training	COMPLIANT
FIRE DEPARTMENT	Kozak	Rebecca	20110 - Fire Chief Unit	5/21/2018	TCSE/ Annuitant	421	Temporary assistance developing staff and functions of the Office of the Chief of Fire manual and train Executive Assistant	COMPLIANT

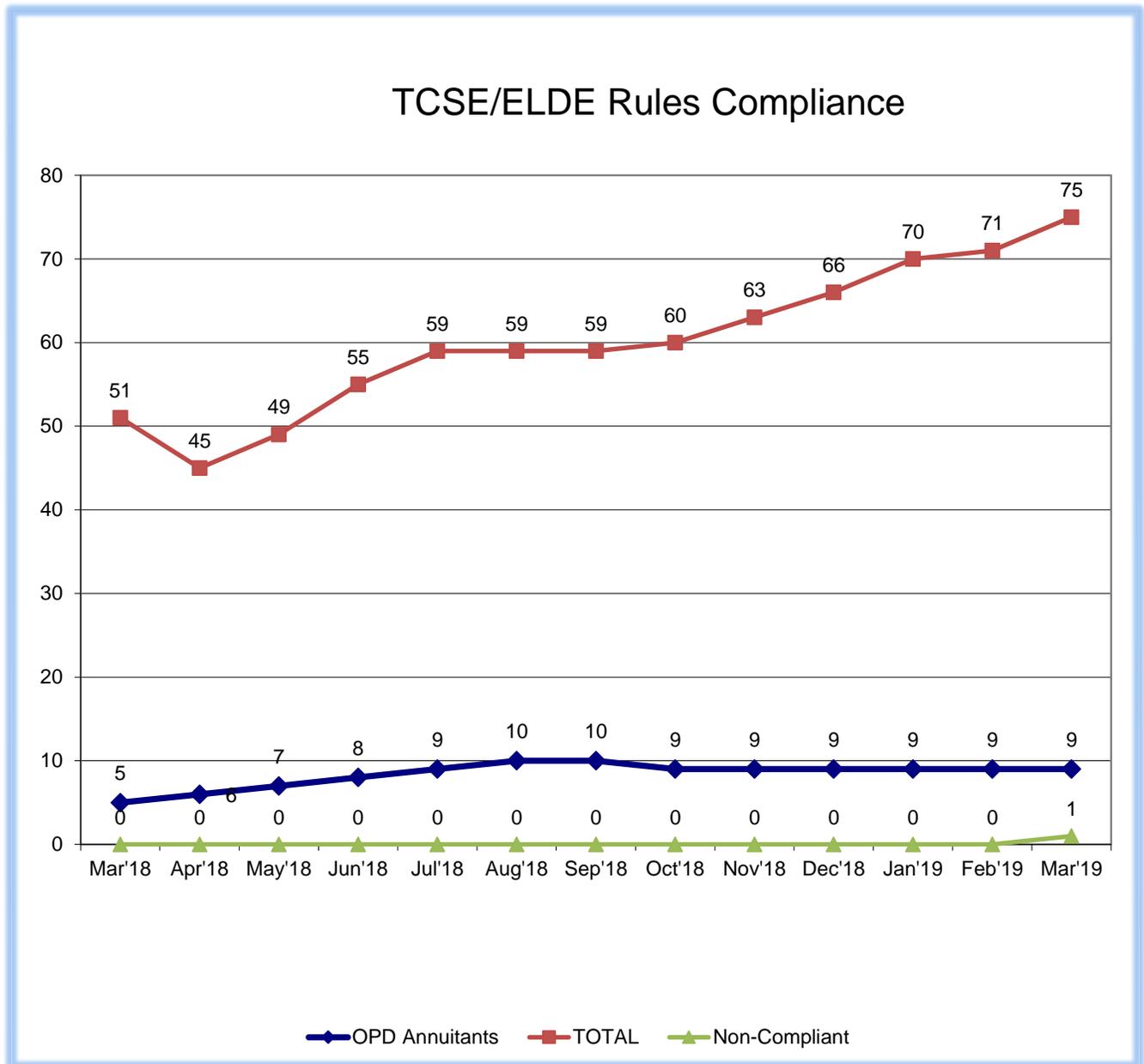
As of: February 22, 2019

**CIVIL SERVICE BOARD  
March 2019 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
FIRE DEPARTMENT	Morris	Christopher	20611 - Education & Training Administration	12/3/2018	ELDE		Spec under development/revision for Fire Equipment Technician; duties not yet fully defined.	COMPLIANT
FIRE DEPARTMENT	Theshome	Theodeross	20521 - Budget Unit	11/19/2018	ELDE		Temporary assignment to cover essential duties of incumbent out of leave	COMPLIANT
HOUSING & COMMUNITY DEV.	Campos	Claudette	89969 - Residential Rent Arbitration	12/15/2018	ELDE		Critical temporary support for the Rent Adjustment Program Manager	COMPLIANT
HOUSING & COMMUNITY DEV.	Williams	Sandra	89939 - Residential Lending & Rehabilitation	11/3/2018	TCSE	540	Temporary assignment to cover essential duties of former incumbent.	COMPLIANT
HUMAN RESOURCES	Look	Daryl	05211 - Human Resources Management	9/24/2018	TCSE/ Annuitant	317	Temporary staffing to support classification and recruitment needs for city operations	COMPLIANT
HUMAN SERVICES	Breedlove	Jaqueline	75231 - Multipurpose Senior Service Program	2/24/2018	TCSE/ Annuitant	788	Provide training to new Case managers and complete procedural manual for future reference per funder's mandate.	COMPLIANT
HUMAN SERVICES	Decuir	Roslynn	78241 - Year Round Lunch Program Unit	5/23/2016	TCSE	187	PT Food Program Coordinator; intermittent, pending creation of PT class; HRM staff preparing salary ordinance amendment to add part time equivalent in Feb/Mar 2018	COMPLIANT
HUMAN SERVICES	Dennis-Taylor	Lisa	78231 - HS Classroom & Seasonal	8/13/2018	ELDE		Temporary, emergency staffing to prepare for up coming review/inspections.	COMPLIANT
HUMAN SERVICES	Hicks	Kathleen	78111 - DHS Administration Unit	1/2/2019	ELDE		Filing in for Executive Assistant staff out on leave.	COMPLIANT
HUMAN SERVICES	Ho	Kathy	78231 -HS Classroom & Seasonal	1/29/2018	TCSE/ Annuitant	488	Temp assignment to help with Instructor Staffing Crises and to meet Federal and State regulations of the Head Start Program.	COMPLIANT
HUMAN SERVICES	Lemos	Jesus	78231 - HS Classroom & Seasonal	10/8/2018	TCSE	673	Temporary, emergency staffing to prepare for upcoming inspections	COMPLIANT
HUMAN SERVICES	Shelton	Susan	78411 - Community Housing Services	9/11/2017	TCSE/ Annuitant	97	Temporary project: plan, facilitate and update Oakland Homeless Strategy	COMPLIANT
HUMAN SERVICES	Turner	Kartiea	78111 - DHS Administration Unit	11/5/2018	ELDE		Temporary support to prepare for Federal Review, new grant rollouts and other special projects.	COMPLIANT
INFORMATION TECHNOLOGY	Ibrahim	Mamadou	46531 - Technology Department	9/22/2018	ELDE		Temporary project to help develop and implement the new PRIME System for OPD.	COMPLIANT
INFORMATION TECHNOLOGY	Williams	Mheret	46121 - Reprographic Services	11/5/2018	TCSE	482	Temporary support for staff out on leave.	COMPLIANT
PLANNING & BUILDING	Alvin	Corey	84211 - Planning	9/8/2018	ELDE		Temporary project to coordinate the implementation of the environmental protection measures for the Oakland Army Base Redevelopment project.	COMPLIANT
PLANNING & BUILDING	Borjon	Agustin	84229 - Zoning	2/27/2017	TCSE/ Annuitant	616	Time-limited project; temp assistance with backlog of permits	COMPLIANT
PLANNING & BUILDING	Dignan	Katie	84111 - Administration Unit	6/30/2018	ELDE		Temporary assistance to oversee the Building and Planning Bureaus.	COMPLIANT
PLANNING & BUILDING	Zhu	Krista	84111 - Admin: Planning, Building & Neighborhood Services	7/30/2018	ELDE		Temporary assistance for the Accela clean-up project.	COMPLIANT
POLICE	Covington	Donald	106610 - Background & Recruiting	4/23/2018	TCSE/ Annuitant	315	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Denson III	Benjamin	106610 - Background & Recruiting	12/1/2018	TCSE	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Gray	Steve	106610 - Background & Recruiting	7/17/2017	TCSE/ Annuitant	135	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Hicks	Mark	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	296	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Johnson	Carmen	106610 - Background & Recruiting	1/18/2014	TCSE/ Annuitant	674	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT

**CIVIL SERVICE BOARD  
March 2019 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
POLICE	Lighten	Ronald	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	137	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Mackson	Trevor	106610 - Background & Recruiting	12/1/2018	TCSE	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Mestas	Alfred	100610 - Background & Recruiting	1/27/2018	TCSE/ Annuitant	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Pressnell	Edward	100610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	270	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Quintero	Joseph	106610 - Background & Recruiting	10/12/2013	TCSE/ Annuitant	65	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Smith	Angela	108150 - District 5 Area	10/20/2018	TCSE	675	Temporary staffing to support critical need in the administration of the OPD towing services contract	COMPLIANT
POLICE	Williams	Pamela	106610 - Background & Recruiting	4/23/2018	TCSE/ Annuitant	20	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
PUBLIC WORKS	Chavez	Humberto	30541 - Equipment Services Division	12/18/2017	TCSE	904	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Gettone	Jacquelyne	30121 - PWA Fiscal Services	12/15/2018	TCSE	248	Temporary support to assist with multiple complex departmental projects	COMPLIANT
PUBLIC WORKS	Kuvetakis	Joseph	30541 - Equipment Services Division	1/2/2019	ELDE		Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Ogbamichael	Lettebrhan	30121 - PWA Admin/Fiscal Services	8/11/2018	TCSE/ Annuitant	837	Temporary assignment to cover the duties of employees out on leave	COMPLIANT
PUBLIC WORKS	Pham	Tan	30541 - Equipment Services Division	12/18/2017	TCSE/ Annuitant	536	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Stern	Jennifer	30245 - Watershed & Storm Water Program	12/1/2018	ELDE		Temporary assistance to provide regulatory compliance & critical storm water response services	COMPLIANT
PUBLIC WORKS	Tsang	Diana	30121 - PWA Admin/Fiscal Services	9/8/2018	TCSE	812	Temporary assignment to cover the duties of employees out on leave	COMPLIANT
PUBLIC WORKS	Vargas	Abel	30541 - Equipment Services Administration	9/10/2018	TCSE/ Annuitant	880	Temporary assistance to ensure critical City services, including public safety.	COMPLIANT
PUBLIC WORKS	Weed	Jonelyn	30111 - Director & Human Resources Unit - new date 1/12/2019 s	12/16/2017	TCSE/ Annuitant	207	Temporary support to help develop and facilitate Department Strategic Action Plan	COMPLIANT
<b>Non-Compliant (1)</b>								
PUBLIC WORKS	Hernandez	Raul	30244 - Sanitary Sewer Design	8/11/2018	TCSE	960	Temporary assignment to assist with the City's Private Sewer Lateral (PSL) program.	NON-COMPLIANT





CITY OF OAKLAND

# *STAFF REPORT*

**DATE:** February 21, 2019

**TO:** THE HONORABLE CIVIL SERVICE BOARD

**FROM:** Greg Preece, Human Resources Manager

**THROUGH:** Ian Appleyard, Director of Human Resources Management

**SUBJECT:** Informational Report Regarding City and Port Common Classifications

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At its January 17, 2019 meeting, the Civil Service Board requested the City provide information that outlines surrounding city - port relationships regarding common classifications, transfer opportunities, and wages, and to provide possible options the Board could consider as it relates to the common classification system currently in-place between the City and the Port.

## **COMPARABLE PORT RELATIONSHIPS**

Eight (8) city-port relationships were surveyed to include the cities/ports of Stockton, Richmond, San Diego, San Francisco, Long Beach, Los Angeles, Seattle and Portland. Of the eight, four (4) function as separate entities with no operational relationship, while the other four (4) have interdependent relationships with few differences. With respect to the relationships between the cities/ports of Richmond, San Francisco, Long Beach and Los Angeles, the ports are either “departments” of or “enterprise agencies” to the respective city. Each port has unique job classifications relative to the operation (Long Shoreman, Airport Specialist, Harbor Worker, etc.) and share other common classifications with their respective city. Port or city employees in common classifications may transfer between entities under established Memorandums of Understanding (MOU), civil service or other established city/port processes. Apart from Los Angeles, the pay scales are uniform.

The City of Richmond and the City of San Francisco facilitate the recruitment processes for the ports, while the ports of Los Angeles and Long Beach have separate recruitment processes. The ports of Stockton, San Diego, Portland and Seattle are separate organizations not under the governance of the city in which the port is located.

Additional information related to each is included below:

- **Stockton** – the Port of Stockton is a separate entity from the city. The Port maintains its own compensation and classification system and does not fall under the jurisdiction of the Civil Service Board. Incumbents must apply to each entity separately and there are no transfer opportunities.
- **Richmond** – the Port and the City operate as one entity; Port employees are considered city employees. All classifications fall under the City of Richmond and are equal in pay. There are some classifications that are specific to the port operation. The city does all recruiting for the port and employees transfer at will.
- **San Diego** - the Port is a special district created by the State of California to serve the “people of California” not just the City of San Diego. It appears to be a separate entity from the City of San Diego. The Port of San Diego has its own unique classification system and personnel

administration that is separate from the city. Incumbents must apply to each agency separately and there does not appear to be any transferring between the two entities.

- **San Francisco** – the Port is considered a public “enterprise agency” of the City and County of San Francisco. Port commissions and directors, etc., serve as “trustees” and managers of waterfront property owned by the City. Classifications fall under “City and County of San Francisco” and there are some unique classes to the Port. The City and County of San Francisco does the recruiting for the Port and the pay is the same.
- **Long Beach** – Does have city to port transfer opportunities and utilizes common classifications into which employees can transfer back and forth. There does not appear to be wage discrepancies between the classifications; for example, and Admin Aide I-II with the City makes the same as an Admin Aide I-II at the Port.
- **Los Angeles** – the Port is considered a “proprietary and self-supporting department” of the City. Employees may transfer to the “harbor” at will. There are pay discrepancies in the classes available, and there are classifications unique to the Harbor employees, ex. Longshore man.
- **Seattle and Portland** – Are combined ports, as they operate a containerized seaport and airport. The Port of Seattle and Portland are separate from the respective cities. The two ports maintain their own compensation and classification system and do not fall under the jurisdiction of the Civil Service Board. There are no transfer opportunities. Incumbents must apply to each entity separately.

#### **OPTIONS THE BOARD COULD CONSIDER**

- **Leave the Current System In-Place** – The Board could take no action and leave the current system in-place as specified within the Civil Service Rules.
- **Maintain a Common Class System only for Layoff Procedures** – This would allow current Port and City employees in common classifications to move between the Port and the City during layoff procedures based on seniority and the provisions specified in Section 9.02 of the Civil Service Rules. Each entity would continue with its own hiring processes and employees would not be eligible for non-layoff transfers.
- **Maintain a Common Class only for Transfers** – This would allow current Port and City employees in common classifications to transfer between the Port and the City; however, in the event of layoffs, seniority would only be considered within the entity to which the employee is assigned.
- **Determine All Classifications are Distinct** – This would be similar to other ports referenced above in that each entity would maintain its own classification system and persons interested in working for either agency would have to apply directly for positions of interest.

#### **LEGAL OPINION REGARDING FAIR PAY BETWEEN ENTITIES**

The City Attorney’s Office has advised Human Resources Staff it is unaware of any law that would prevent higher pay ranges for Port classifications than City classifications.

## **IMPACT OF Y-RATING EMPLOYEES THAT TRANSFER**

The Board asked Staff to provide information regarding the potential impacts of Y-rating employees who move between entities where pay grades are different (Y-Rating refers to paying an employee above the maximum of the salary range for the classification).

Due to the discrepancies in pay between the entities, this is only a factor when Port employees transfer to City positions with a lower maximum pay range. As such, this has a potential impact on the respective department's budget and creates an issue where employees performing the same work within the same department/division would not be receiving equal pay.

## **NEXT STEPS**

Staff is available to research any additional information the Board needs prior to deciding how best to proceed. Staff recommends the Board determine the value of continuing the Koff & Associates Classification and Point Factor Analysis at this stage of the process. Additionally, the Board is reminded of the necessity to meet and confer with the bargaining units regarding any proposed changes to the Civil Service Rules.

For questions regarding this report, please contact Greg Preece, Human Resources Manager, at (510) 238-7334.



CITY OF OAKLAND

## MEMORANDUM

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**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board      **FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of Requests for Exemption from Civil Service and Approval of  
Classification Specification for Manager, Housing Development

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Based upon a classification review at the request of the Housing & Community Development Department, staff has proposed the reactivation, revision/establishment, and formal exemption of the **Manager, Housing Development** classification. A working draft exists but the classification was deactivated nearly a decade ago. It was involved in the UM1/UM2 bargaining process that occurred between the International Federation of Professional & Technical Engineers (IFPTE, Local 21) and the City at that time. At the conclusion of that bargaining process, discussion regarding the exemption status of the classification was tabled because the classification was no longer allocated in the budget; the matter would be decided following continued discussion if the classification was ever to be used again.

Due to the City's focus on the affordable housing crisis, the Housing and Community Development Department has determined that this position is critical to their successful operations. Therefore, staff proposed the reactivation of the classification. The working draft served as the basis for the final proposed draft that has been submitted as part of this agenda packet.

The Manager, Housing Development classification will be responsible for planning, organizing, managing, and directing the work of the department's Housing Development Services Division in addition to training and supervising assigned staff. The position will govern multiple program areas including affordable housing development, finance, and asset management of the City's existing affordable housing loan portfolio. The authority and responsibility of this position are commensurate with other Manager classifications across the City in the UM1 representation unit.

The City Charter, under Title IX Personnel Administration, section 902, sets forth the conditions under which positions may be exempt from Civil Service. Certain offices are expressly listed but section 9.02(f) provides that other positions may be exempted if recommended by City Council and approved by the Civil Service Board.

This is an expert level, management classification responsible for developing and approving policies and ensuring compliance while governing multiple program areas having major impact on the attainment of the goals of the City. It will have overall responsibility for daily operations in a division of the department and is required to utilize a high degree of independence in carrying out the goals and objectives of the City Administrator and City Council; the scope of responsibilities

is broad and complex; and the individual in the classification must deal with challenging, sensitive, and confidential matters with the potential for a high consequence of error. Staff recommends exempting the classification from the provisions of civil service for the reasons cited above.

Local 21 was notified of the intent to reactivate and exempt the classification. Representatives from the City and Local 21 met on October 18, 2018 to discuss potential impacts. The City was notified by email on October 25, 2018 that there were no objections to the proposed actions related to the Manager, Housing Development classification.

Attached to this report is the City Council resolution recommending that the Civil Service Board exempt the classification of Manager, Housing Development from the provisions of civil service. The resolution was approved at the City Council meeting on February 26, 2019; a copy of the executed resolution (C.M.S. 87550) is attached.

There is one vacancy. The approved classification specification will be used to initiate the exempt job posting and appointment process in the near future.

Staff recommends that the Civil Service Board exempt the classification of **Manager, Housing Development** from the provisions of civil service pursuant to Charter Section 902(f) and approve the classification specification as proposed.

**Attachments:** A. Proposed Manager, Housing Development classification specification  
B. City Council Resolution Recommending Exemption of Manager, Housing Development



## MANAGER, HOUSING DEVELOPMENT

Class Code: EM185 FTE Exempt

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### DEFINITION

Under administrative direction in the Housing and Community Development Department, plans, organizes, manages, and directs the work of the Housing Development Services Division; trains and supervises assigned staff; and performs related duties as assigned.

### DISTINGUISHING CHARACTERISTICS

This is a division head position that is responsible for the overall administration of the housing development, finance, planning and asset management functions of the Department. Pursuant to the Oakland Charter 902(f) and Oakland Municipal Code, this position is exempt from the regulations of the Civil Service Board. This classification is distinguished from Director, Housing and Community Development, which is a department head

The incumbent receives direction from the Director, Housing and Community Development and exercises direction over assigned professional, technical, and clerical staff including Housing Development Coordinators and Home Management Specialists.

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

Plan, organize, manage, and direct, through subordinate supervisors, the work of the Housing Development Services Division, including affordable housing development and finance (new construction and acquisition/rehabilitation), and asset management of the City's existing affordable housing loan portfolio.

Manage and direct housing development programs and activities, including land acquisition, preparation of development and disposition plans, loan programs, and issuing Notices of Funding Availability and carrying out the project selection process.

Manage and direct first-time home buyer programs and activities, including application procedures, financing, and loan processing.

Manage and direct the asset management activities for the City's affordable housing loan portfolio.

Develop and direct the implementation of goals, objectives, policies, procedures, and work standards for the Division.

Develop and implement management systems, procedures, and standards for housing program evaluation.

Develop and implement systems for collecting and analyzing data on division activities, accomplishments, and trends.

Direct the preparation of a variety of studies and reports relating to current and long-range affordable housing development issues and develop specific proposals to address them.

Direct the preparation and administration of the division budget; monitor and track City-controlled affordable housing resources.

Direct the selection, supervision, and work evaluation for Division staff; provide for staff training and development.

Coordinate the work of the Division with other City departments, outside agencies, and concerned citizens.

Maintain effective relations with a variety of community organizations, groups, and individuals; work closely with other division heads and City staff to provide comprehensive services and solve service delivery, community, and administrative issues and concerns.

Monitor developments related to the housing program, evaluate their impact on City operations, and implement policy and procedure improvements.

### **KNOWLEDGE AND ABILITIES**

Knowledge of:

- Federal, state, and municipal laws and regulations governing housing development projects and programs, including Housing and Urban Development (HUD) regulations.
- Federal, state, and private financing methods and approaches; methods and procedures for drafting, reviewing, and negotiating complex legal agreements with developers and property owners.
- Financial feasibility, project due diligence, and underwriting the capacity of prospective developers and borrowers.
- Land acquisition and the preparation of development and disposition plans.
- Local government organization and the functions and practices of housing development, affordable housing finance, and housing programs carried out at the local level.
- Administrative principles and methods, including goal setting, program development and implementation, and employee supervision.
- Principles and practices of budget development and administration.
- Computer systems and software applications including Microsoft Office.

Ability to:

- Plan, manage, and direct a comprehensive affordable housing development program.
- Select, motivate, and evaluate staff; provide for their training and professional development.
- Cultivate and foster strong project management skill sets and practices within the division.

- Analyze complex technical and administrative housing problems, evaluate alternative solutions, and recommend or adopt effective courses of action.
- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls.
- Make presentations; communicate ideas and recommendations.
- Interpret and apply complex rules, regulations, laws, and ordinances.
- Prepare clear and concise reports, correspondence, and other written materials.
- Exercise sound independent judgment within general policy guidelines.
- Utilize computer systems and software applications, including Microsoft Office.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

**MINIMUM QUALIFICATIONS**

*The following qualifications are guidelines, as the appointing authority has broad discretion in filling positions in this classification.*

**Education:**

A Bachelor’s degree from an accredited college or university in business or public administration, urban planning, real estate or a closely related field.

**Experience:**

Five (5) years of progressively responsible experience in housing development, housing finance, and/or rehabilitation program management work including three (3) years at the supervisory level. Experience in federally-funded programs is desirable.

**LICENSE OR CERTIFICATE**

An incumbent in this position is expected to operate automotive vehicles in the performance of assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be an efficient method for traveling to required locations. An individual appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

**OTHER REQUIREMENTS**

None required.

<b>DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY</b>			
Established:    _/_/___	CSB Resolution #:    _____	Salary    Ordinance	
		#:	
Exempted:    Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:    902(____)		
Revision Date:    / /	CSB Resolution #:		
Re-titled Date:    / /	CSB Resolution #:	Salary    Ordinance	
		#:	
(Previous title(s):    n/a )			

FILED  
OFFICE OF THE CITY CLERK  
OAKLAND

*Ryan J. R.*  
City Attorney's Office

2019 FEB -7 PM 2:36

# OAKLAND CITY COUNCIL

RESOLUTION NO. 87550 C.M.S.

INTRODUCED BY COUNCILMEMBER [IF APPLICABLE]

## RESOLUTION RECOMMENDING TO THE CIVIL SERVICE BOARD THE EXEMPTION OF THE CLASSIFICATION OF MANAGER, HOUSING DEVELOPMENT FROM THE OPERATION OF CIVIL SERVICE

**WHEREAS**, the Oakland City Charter Section 902(f) requires that City Council recommend positions for exemption from Civil Service prior to Civil Service Board approval of such exemption; and

**WHEREAS**, the Manager, Housing Development is recommended for exemption from Civil Service due to its placement in the organization, lines of authority, reporting relationships within the department, as well as the position's duties, pay grade and independence of action; and

**WHEREAS**, the Manager, Housing Development is an expert level classification responsible for approving policies and ensuring compliance while governing multiple program areas (affordable housing development, finance, and asset management of the City's existing affordable housing loan portfolio) having major impact on the attainment of the goals of the City; and

**WHEREAS**, the Manager, Housing Development is a management classification with overall responsibility for daily operations in a division of the Housing & Community Development's Department and is required to utilize a high degree of independence in carrying out the goals and objectives of the City Administrator and City Council; the scope of responsibilities is broad and complex, and the individual in the classification must deal with challenging, sensitive, and confidential matters; and

**WHEREAS**, the incumbent in the Manager, Housing Development position is expected to exercise considerable discretion in carrying out the City's mission for with there is a high consequence of error; now, therefore, be it

**RESOLVED**, the City Council of Oakland hereby recommends to the Civil Service Board that the classification of Manager, Housing Development be exempted from the requirements of civil service; and be it

**FURTHER RESOLVED**, that the Civil Service Board is hereby requested to approve such exemption.

IN COUNCIL, OAKLAND, CALIFORNIA,

PASSED BY THE FOLLOWING VOTE: **FEB 26 2019**

AYES - FORTUNATO BAS, GALLO, GIBSON MCELHANEY, KALB , TAYLOR, THAO AND PRESIDENT KAPLAN →

NOES - 0

ABSENT - 0

ABSTENTION - 0

*Excused-heid - 1*

ATTEST: \_\_\_\_\_



LATONDA SIMMONS  
City Clerk and Clerk of the Council of the  
City of Oakland, California



CITY OF OAKLAND

## MEMORANDUM

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**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board      **FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of Requests for Exemption from Civil Service and Approval of  
Classification Specification for Manager, Real Property Asset (formerly titled  
Manager, Real Estate Services)

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Based upon a classification review at the request of the Economic & Workforce Development Department, staff has proposed the revision and formal exemption of the **Manager, Real Property Asset** classification. The classification has existed for several decades. However, the official classification specification was only established in June 2014 and has not been revised since that time. While it was initially treated as exempt from civil service, it became a civil service classification nearly a decade ago. The City recently reevaluated the duties of the position and determined that it should be proposed for formal exemption.

A variety of revisions have been proposed:

- Cite the actual name of the Real Estate Asset Management Division
- Replace references to “disposal” with “disposition.”
- Identify the position as a division head.
- Add the exemption language per Charter section 902(f).
- Broaden the reporting structure to Director or a Project Manager III.
- Refine various Examples of Duties and Knowledge and Abilities statements.
- Replace guidelines under Minimum Qualifications to match with language that applies to an exempt classification.

Further, the City is proposing a title change from Real Estate Services Manager to Real Property Asset Manager. The reference to “real property” is more reflective of industry standards. In terms of duties, asset management is a more appropriate way to capture the broader type of work that is performed.

The Economic & Workforce Development Department recognizes that the included changes to this position are critical to their successful operations. The Manager, Real Property Asset classification is responsible for: planning, organizing, managing, and directing activities in the Real Estate Asset Management Division involving properties owned and leased by the City of Oakland and the Oakland Redevelopment Successor Agency (ORSA); managing leasing, acquisition, and disposition of real property; managing all real estate appraisal and valuation services; managing real property negotiations and contract administration; managing all property

## CIVIL SERVICE BOARD

Subject: Manager, Real Property Asset – Exemption and Classification Specification Approval

Date: March 21, 2019

Page 2

and asset management functions and property inventory; and training and supervising assigned staff. The position will govern multiple program areas including leasing, acquisition, disposition, appraisal and valuations, negotiation, contract administration, and asset management. The authority and responsibility of this position are commensurate with other Manager classifications across the City in the UM1 representation unit.

The City Charter, under Title IX Personnel Administration, section 902, sets forth the conditions under which positions may be exempt from Civil Service. Certain offices are expressly listed but section 9.02(f) provides that other positions may be exempted if recommended by City Council and approved by the Civil Service Board.

This is an expert level, management classification responsible for developing and approving policies and ensuring compliance while governing multiple program areas having major impact on the attainment of the goals of the City. It will have overall responsibility for daily operations in a division of the department and is required to utilize a high degree of independence in carrying out the goals and objectives of the City Administrator and City Council; the scope of responsibilities is broad and complex; and the individual in the classification must deal with challenging, sensitive, and confidential matters with the potential for a high consequence of error. Staff recommends exempting the classification from the provisions of civil service for the reasons cited above.

Local 21 was notified of the intent to revise, re-title, and formally exempt the classification. Representatives from the City and Local 21 met on December 13, 2018 to discuss potential impacts. The City was notified by email on January 18, 2019 that there were no objections to the proposed actions related to the Manager, Real Property Asset classification.

Attached to this report is the City Council resolution recommending that the Civil Service Board exempt the classification of Manager, Real Property Asset from the provisions of civil service. The resolution was approved at the City Council meeting on February 26, 2019; a copy of the executed resolution (C.M.S. 87549) is attached.

The salary ordinance amendment to amend the classification title and bargaining unit assignment is presently being routed through City Council for approval. The first reading occurred on February 26, 2019; the second reading is anticipated to occur on April 2, 2019 due to the cancelation of the special meeting scheduled for March 12, 2019.

There is one vacancy. The approved classification specification will be used to initiate the exempt job posting and appointment process in the near future.

Staff recommends that the Civil Service Board exempt the classification of **Manager, Real Property Asset** from the provisions of civil service pursuant to Charter Section 902(f) and approve the classification specification as proposed.

**Attachments:** A. Proposed Manager, Real Property Asset classification specification  
B. City Council Resolution Recommending Exemption of Manager, Real Property Asset



## **REAL ESTATE SERVICES** **PROPERTY ASSET MANAGER**

**Class Code: EM201 FTE**

**Civil Service Classified**

### **DEFINITION**

Under administrative direction in the Economic & Workforce Development (EWD) Department, plans, organizes, manages, and directs activities in the Real Estate Asset Management Division involving properties owned and leased by for the City of Oakland and the Oakland Redevelopment Successor Agency (ORSA); manages ~~all~~ leasing, acquisition and disposition~~al~~ of real property; manages all real estate appraisal and valuation services; manages ~~all~~ real property negotiations and contract administration; manages all property and asset management functions and property inventory; trains and supervises assigned staff; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS**

~~This Real Estate Services Manager~~ is a management division head level position with responsibility for the ~~overall~~ administration of real propertyestate asset management services for the City of Oakland and the Oakland Redevelopment Successor Agency. Pursuant to the Oakland Charter 902(f) and Oakland Municipal Code, this position is exempt from the regulations of the Civil Service Board. This classification is distinguished from the Director of Economic & Workforce Development, which is a department head. This classification performs duties involving the exercise of considerable discretion and latitude of judgment in the formulation and development of policies and procedures.

The incumbent rReceives direction from the Director of Economic & Workforce Development, Project Manager III or other management staff and exercises direct supervision over Real Estate Agents, including any Supervising Real Estate Agent, and other assigned professional, technical and clerical staff.

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

Plan, organize, manage, and direct ~~through subordinate supervisors,~~ the acquisition, lease, property management, and disposition~~al~~ of ~~all~~ City and Oakland Redevelopment Successor Agency real property; ~~negotiate leases for large blocks of office space.~~

Direct the preparation of a variety of studies and reports relating to current and long-range real estate asset management.

Relocate residential and commercial property owners displaced because of City or Agency acquisition.

Coordinate and direct appraisal, valuation, and consultation services for the City to the departments; ~~coordinate the work of the section with City staff other agencies and concerned citizens;~~ manage the administration of appraisal contracts.

Review reports on environmental conditions of properties to determine whether toxic hazards exist and to make administrative decisions on acquisition or dispositional; negotiate contracts with contractors and consultants.

Prepare or review reports for the City Administrator, Oakland Redevelopment Successor Agency, City Council or commissions; serve as a liaison to City Council and other public and private groups to explain or coordinate plans for proposed projects and to respond to their concerns.

Advise EWD management, the City Administrator, and City Council in the highest and best use of the City real estate holdings, courses of action to be taken, and the preliminary planning for major real estate projects to include acquisition of real property by condemnation and litigation.

Supervise and participate in property right-of-way negotiations for the purchase, lease or sale of real estate involving large amounts of money and are highly complex in nature; review business and residential relocation activities.

Monitor developments related to real estate management, acquisition, and dispositional; evaluate their impact on City operations; implement policy and procedure improvements.

Develop and direct the implementation of goals, objectives, policies, procedures, and work standards for the Real Estate Asset Management Division~~section~~; develop and implement management systems, procedures, and standards for program evaluation.

Direct the preparation and administration of the ~~section~~Division budget.

Direct and participate in the selection, supervision, and performance evaluation for ~~section~~Division staff; provide for staff training and development.

Manage the City's real estate, survey, property management, title, and escrow services contracts.

Drive automotive vehicles to travel to various locations in the city and community, regional, and departmental meetings as required in the performance of duties.

## **KNOWLEDGE AND ABILITIES**

Knowledge of:

- The principles and practices of private and public sector leasing, real estate appraisal, valuation, acquisition, relocation, dispositional, and property and asset management functions.
- Federal and state laws pertaining to appraisal, acquisition or dispositional of real property, relocation law, right-of-way acquisition, and legal descriptions of real property.
- Contract administration, real estate title and escrow procedures, leasing, and asset management.
- Administrative principles and methods, including goal setting, program development, and implementation.
- Principles and practices of management, supervision and staff development, and evaluation.

- Principles and practices of budget development and administration.
- Computer systems and software applications.

Ability to:

- Manage and direct a comprehensive real estate asset management services program.
- Coordinate a variety of functional specialties with overlapping work areas.
- Select, supervise, and evaluate staff and provide for their training and professional development.
- Analyze complex technical and administrative real estate management, acquisition, dispositional and appraisal valuation problems, evaluate alternative solutions, and recommend or adopt effective courses of action.
- Manage the negotiation and administration of a variety of contracts.
- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls.
- Communicate effectively orally and in writing; prepare complex reports, correspondence, and other written materials; make presentations.
- Administer a division budget.
- Exercise sound independent judgment within general policy guidelines.
- Utilize computer systems and software applications.
- Establish and maintain positive relations with those contacted in the performance of required duties.

## MINIMUM QUALIFICATIONS

*The following qualifications are guidelines, as the appointing authority has broad discretion in filling positions in this classification. ~~Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.~~*

### **Education:**

Bachelor's degree from an accredited college or university with major course work in real estate, economics, business or public administration; or a closely related field. International Right of Way Association coursework is desirable.

### **Experience:**

Five (5) years of responsible management experience in real property appraisal, acquisition, disposition, and asset management as a unit supervisor or division manager. Public sector and right of way experience are highly desirable.

## LICENSE OR CERTIFICATE

Possession of a State of California Real Estate Broker's License is desirable.

State of California General or Residential appraisal certificate is desirable.

International Right of Way Association Senior designation (SR/WA) is desirable.

Certified Property Manager (CPM) or other Commercial Real Estate designation is desirable.

Successful incumbents in this position are expected to operate automotive vehicles in the performance of assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be a cost effective or efficient method for traveling to the various locations required. Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

### **OTHER REQUIREMENTS**

None required.

#### **DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY**

Established: 06/19/2014      CSB Resolution #: 44725      Salary Ordinance #:  
Exempted:    Y  N       Exemption Resolution #:

Revision Date:        /   /      CSB Resolution #:  
Re-titled Date:       /   /      CSB Resolution #:      Salary Ordinance #:

(Previous title(s):        )

FILED  
OFFICE OF THE CITY CLERK  
OAKLAND

*Ryan J. [Signature]*  
City Attorney's Office

2019 FEB -7 PM 2: 36

# OAKLAND CITY COUNCIL

RESOLUTION NO. 87549 C.M.S.

INTRODUCED BY COUNCILMEMBER [IF APPLICABLE]

## RESOLUTION RECOMMENDING TO THE CIVIL SERVICE BOARD THE EXEMPTION OF THE CLASSIFICATION OF MANAGER, REAL PROPERTY ASSET FROM THE OPERATION OF CIVIL SERVICE

**WHEREAS**, the Oakland City Charter Section 902(f) requires that City Council recommend positions for exemption from Civil Service prior to Civil Service Board approval of such exemption; and

**WHEREAS**, the Manager, Real Property Asset (formerly titled Real Estate Services Manager) is recommended for exemption from Civil Service due to its placement in the organization, lines of authority, reporting relationships within the department, as well as the position's duties, pay grade and independence of action; and

**WHEREAS**, the Manager, Real Property Asset is an expert level classification responsible for approving policies and ensuring compliance while governing multiple program areas (leasing, acquisition, disposition, appraisal and valuations, negotiation, contract administration, and asset management) having major impact on the attainment of the goals of the City; and

**WHEREAS**, the Manager, Real Property Asset is a management classification with overall responsibility for daily operations in a division of the Economic & Workforce Development's Department and is required to utilize a high degree of independence in carrying out the goals and objectives of the City Administrator and City Council; the scope of responsibilities is broad and complex, and the individual in the classification must deal with challenging, sensitive, and confidential matters; and

**WHEREAS**, the incumbent in the Manager, Real Property Asset position is expected to exercise considerable discretion in carrying out the City's mission for with there is a high consequence of error; now, therefore, be it

**RESOLVED**, the City Council of Oakland hereby recommends to the Civil Service Board that the classification of Manager, Real Property Asset be exempted from the requirements of civil service; and be it

**FURTHER RESOLVED**, that the Civil Service Board is hereby requested to approve such exemption.

IN COUNCIL, OAKLAND, CALIFORNIA,

**FEB 26 2019**

PASSED BY THE FOLLOWING VOTE:

AYES - FORTUNATO BAS, GALLO, GIBSON MCELHANEY, KALB, ~~GO~~, TAYLOR, THAO AND PRESIDENT KAPLAN → 7

NOES - 0

ABSENT - 0

ABSTENTION - 0

*Approved - Reid - 1*

ATTEST:



LATONDA SIMMONS  
City Clerk and Clerk of the Council of the  
City of Oakland, California



CITY OF OAKLAND

# MEMORANDUM

**DATE:** March 21, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of New Classification Specification for Courier

Based upon a classification review at the request of several departments, staff has proposed the creation of a new classification titled **Courier**. The establishment of this new classification will help multiple departments address their needs to route mail, packages, light equipment, and supplies on a regular basis. No classification presently exists that is charged solely with making deliveries across the City.

Here is summary information related to the new classification:

This is a proposed new, entry-level classification. Incumbents will: receive and transport incoming and outgoing mail; drive a City vehicle for item pick-up and delivery to various locations; transport supplies, materials, and equipment; take inventory of, order, and deliver departmental supplies, materials, and equipment; maintain files and records; and perform routine clerical tasks.

The Service Employees International Union (SEIU, Local 1021) was notified of the proposed new classification specification. City staff and union representatives met on multiple occasions in late 2018 and early 2019 to discuss the proposed new classification and potential impacts. Following several discussions and full vetting of the union's concerns, the union confirmed via email on February 13, 2019 that they have no objections to the proposed new classification.

Staff is preparing a salary ordinance amendment to create the new classification. It is expected to be placed on an upcoming agenda for the Finance and Management Committee in April/May 2019.

Once the new classification has been created and departments have allocated positions in their budgets, Human Resources Management will be able to initiate a recruitment process. This is expected to occur as early as July 2019.

Additionally, no determination has been rendered regarding the "common class" status of this classification. The "Common Class" Project is currently underway, and more information will be available at a later date.

Staff recommends that the Civil Service Board approve the proposed new **Courier** classification specification.

**Attachments:** Proposed new draft Courier classification specification.



# COURIER

**Class Code: XXXXX FTE**

**Civil Service Classified**

## **DEFINITION**

Under general supervision in City departments, receives and transports incoming and outgoing mail; drives a City vehicle for item pick-up and delivery to various locations; transports supplies, materials, and equipment; takes inventory of, orders, and delivers departmental supplies, materials, and equipment; maintains files and records; performs routine clerical tasks; and performs related duties as required.

## **DISTINGUISHING CHARACTERISTICS**

This is a city-wide entry-level classification. The incumbent is responsible for handling and transporting mail, packages, supplies, materials, and equipment for the assigned department. The incumbent drives a City vehicle during routine operations and performs clerical tasks as assigned. This classification is distinguished from Van Driver in that the incumbent of the latter class transports passengers in addition to materials and supplies.

The incumbent receives direction from a supervisor and/or other management staff.

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

Pick up, sort, and distribute mail and materials.

Transport outgoing mail, packages, supplies, materials, and equipment using hand trucks, carts, or dollies in a safe and efficient manner.

Warehouse supplies and equipment at interim storage facilities, inventory stored goods and supplies, and maintain records of all items stored.

Log and deliver mail by courier and other overnight mail delivery services upon receipt.

Maintain and clean stock/supply room as necessary.

Maintain routine files and records.

Perform a variety of routine clerical tasks which may include data entry and filing.

Operate a vehicle in the performance of assigned duties.

## **KNOWLEDGE AND ABILITIES**

Knowledge of:

- General mailroom methods and procedures.
- Basic mathematics.
- Basic safety precautions and procedures, including safe lifting techniques.

- General office practices and procedures.
- Geography and maps.
- City policies and procedures.
- Computer systems and software applications.

Ability to:

- Quickly and accurately sort mail by department and by name within department.
- Maintain accurate records related to inventory.
- Receive, store, and deliver supplies.
- Follow oral and written directions.
- Safely lift items weighing up to 65 lbs.
- Practice safe lifting/moving techniques and maneuver heavy boxes and objects, either manually or with proper material handling and lifting equipment.
- Observe safe driving practices and all traffic and parking regulations.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

**MINIMUM QUALIFICATIONS**

*Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.*

**Education:**

High school diploma or equivalent.

**Experience:**

One (1) year of experience transporting materials, packages, inventory, supplies or equipment while operating a vehicle.

**LICENSE OR CERTIFICATE**

Possession of a valid California Driver's License. Due to assignments and hours worked, public transportation may not be an efficient method for traveling to required locations. Individuals appointed will be required to maintain a valid California Driver’s License while employed.

**OTHER REQUIREMENTS**

May be required to pass a background investigation.

<b>DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY</b>			
Established:	/ /	CSB Resolution #:	Salary Ordinance #:
Exempted:	Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:	
Revision Date:	/ /	CSB Resolution #:	
Re-titled Date:	/ /	CSB Resolution #:	Salary Ordinance #:
(Previous title(s): )			