

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR**

The following actions are being posted in accordance with Rule 109. In the absence of requests to meet addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 5
Fiscal Year: 2009/2010
Posted Date: August 18, 2009

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Draft job specifications attached.)

Item #	DEPT/ DIVISION	Class/Title
1	HRD	4220 Personal Property Auditor

Item #	DEPT/ DIVISION	Class/Title
2	HRD	1840 Junior Management Assistant

Item #	DEPT/ DIVISION	Class/Title
3	HRD	1820 Junior Administrative Analyst

For additional information regarding the above proposed action, please contact Cathy Abela at (415) 557-4933.

Posting No: 5
Fiscal Year: 2009/2010
Posted Date: August 18, 2009

Requests to meet on an item should be addressed to the Human Resources Director, 1 South Van Ness, 4th Floor, San Francisco, CA 94103. All requests must be received in writing no later than close of business seven (7) calendar days from the posting date. FAX'd copies will be accepted as timely with original to follow. Copies of this notice may be obtained from the Information Center, 1 South Van Ness, 4th Floor or from DHR's website at:
http://www.sfgov.org/site/sfdhr_page.asp?id=102488

cc: All Employee Organizations
All Departmental Personnel Officers
Anita Sanchez, CSC
Harvey Rose, Budget Analyst
Christina Fong, DHR
Carmela Villasica, DHR
Linda Cosico, DHR
RAS Team Leader(s)
DHR Support Services
Martin Gran, DHR
Steve Ponder, DHR
Cathy Abela, DHR
Karen Taylor, MTA
File

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Personal Property Auditor
Job Code: 4220**

INTRODUCTION

Under general supervision, is responsible for inspecting, analyzing and evaluating personal property holdings of business firms for tax assessment purposes; may audit accounting and related records to verify accuracy of returns made under the Hotel Transient Tax Ordinance; and performs related duties as required.

Requires responsibility for: carrying out and explaining existing auditing procedures and methods in connection with personal property assessment activities; making regular contacts with the general public and representatives of business and commercial firms relative to tax assessment, activities; preparing, checking and reviewing detailed financial and operational records and reports in connection with tax assessment activities

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Examines and audits accounting records, financial statements and related documents of industrial and commercial business firms in connection with the assessment of personal property taxes prescribed by law.
2. Inspects and appraises personal property including merchandise, industrial machinery, office equipment and leasehold improvements, and reconciles financial, records and other related data.
3. Adjusts inventories for purchases, fabrications, processing and sales between last inventory data and the tax assessment date.
4. Reviews and discusses audit findings with property owners or their representatives.
5. Assists tax payers filing tax declarations in the Assessor's office in completing their declarations, and answers questions on personal property tax matters.
6. Supervises and instructs temporary clerks, during the assessment period, in the distribution of property tax demands and completion of demand notices during the filing season.
7. Examines books, accounts and supporting records relative to the purchase and use tax returns of tax payers and establishes tax liability or refunds.
8. Reviews probate inventories to ascertain the portion of such inventories which are subject to personal property tax.
9. Examines and assesses personal property stored in commercial warehouses; prepares work papers and reports of field auditing activities.
10. May examine and audit accounting records, financial statements and related documents of hotels, motels and other guest houses in connection with the administration of the Hotel

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Job Code: 4220

Transient Tax Ordinance

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge, Abilities and Skills: Requires knowledge of: the methods and practices used in auditing accounting and financial records; revenue and taxation codes pertaining to the assessment of personal property.

Requires ability to: audit and appraise personal property; analyze financial and accounting data and draw logical conclusions there from; maintain cooperative and effective relationships with the general public; prepare accurate and concise work papers and reports on auditing activities.

Requires skill in the application of accounting and auditing techniques to practical field problems.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

Requires **possession of a baccalaureate degree from an accredited college or university, with major coursework in accounting, including at least 18 semester units or 24 quarter units of accounting and/or auditing courses; OR**

Possession of a valid Certified Public Accountant License, and completion of at least 18 semester units or 24 quarter units of accounting and/or auditing coursework from an accredited college or university; AND

Two (2) years of verifiable professional level experience as financial auditor or accountant, which must include preparation of financial statements and managerial reports.

Substitution: Additional qualifying experience may be substituted for up to two (2) years of the required education; however, no substitution is allowed for 18 semester units or 24 quarter units of Accounting and/or Auditing courses. One year (2,000 hours) of experience is equivalent to 30 semester units or 45 quarter units.

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LICENSE AND CERTIFICATION

Positions at the Assessor/Recorder's Office require possession of a valid Permanent Appraiser's Certificate issued by the California State Board of Equalization within one year of appointment,

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Title: Personal Property Auditor
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and maintain certification to meet state requirements.

Possession of a valid California Driver's License and ability to meet insurability standards.

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PROMOTIVE LINES

To: Senior Personal Property Auditor

From: Original Entrance Examination

ORIGINATION DATE: 5/10/62

AMENDED DATE: 8/18/09

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN,

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Junior Management Assistant
Job Code: 1840**

INTRODUCTION

Under supervision, the Junior Management Assistant, performs general administrative and/or management functions with rotating assignments. The essential functions of the job include: performing administrative and/or management functions in the areas of operations, budget, contract/grant development, and/or office management/support services; assisting in the preparation of fiscal reports; assisting in developing, managing, and implementing a competitive bid process; managing offices and coordinating clerical and technical support activities; preparing agenda items, attending department meetings, and/or making presentations; gathering, compiling and analyzing data, and preparing reports; assisting in developing and recommending changes to rules, regulations, policies, and procedures; assisting in the analyses of programs, proposals and projects. This class may supervise and evaluate clerical and technical support staff.

DISTINGUISHING FEATURES

The 1840 Junior Management Assistant is the entry-level class in the Management Assistant Series. The 1840 Junior Management Assistant is distinguished from the 1842 Management Assistant in that the latter performs more difficult and responsible tasks than those assigned to incumbents in this job code.

Supervision Exercised: May supervise clerical and technical staff.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Performs administrative and/or management functions in the areas of operations, budget, contract/grant development and/or office management/support services by planning, coordinating, supervising and/or evaluating the activities of assigned staff in order to accomplish departmental goals.
2. Assists in the preparation of fiscal reports by monitoring expenditures and maintaining budget within the organizational goals and projections; reconciling accounts, performing financial analysis, gathering information, and preparing reports in order to ensure compliance with City and departmental policies, rules and regulations.
3. Assists in developing, managing and implementing a competitive bid process by identifying needs, establishing contractual relationships, preparing requests for proposals, consulting with compliance officers in monitoring contracts and/or agreements, reviewing and amending contract documents prepared by contractors/vendors to verify specifications meet departmental requirements.
4. Manages office and coordinates clerical & technical support activities by assigning and evaluating a variety of clerical/administrative functions, such as, data processing, inventory control, distributing or reproducing reports, performing personnel, purchasing & billing functions, invoices, statements, coordinating building security and maintenance, and facilities

**CITY AND COUNTY OF SAN FRANCISCO
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**Title: Junior Management Assistant
Job Code: 1840**

management.

5. Prepares agenda items, attends department meetings, and/or makes presentations at various types of business meetings, including commission(s) meetings, inter-agency meetings or contract negotiations meetings on behalf of the department. May assist in scheduling of some of those meetings.
6. May supervise and evaluate clerical and technical support staff by delegating and reviewing work assignments, counseling and assisting on performance evaluations, and coordinating duties to ensure that procedures, policies and regulations are followed.
7. Gathers, compiles, analyze data and prepares reports using database programs, spreadsheets, various word processing applications, and statistical techniques to conduct surveys, needs assessments, evaluation reports, compile and analyze statistical data, conduct web pages research, and prepare reports for program evaluation.
8. Assists in the development and recommends changes to rules, regulations, policies and procedures by proposing and reviewing provisions and evaluating the effect of proposed regulations, laws, etc., on specific or general personnel, budgeting and other management or administrative functions.
9. Assists in the analyses of programs, proposals & projects by researching and reviewing related information either manually and/or electronically, reviewing documentation, interviewing experts, reading abstracts, prioritizes tasks and guidelines in order to accurately relay information to department supervisors.
10. Performs related duties and responsibilities as assigned

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: Technical methodology, principles, techniques, procedures, and regulations utilized in the management and administration of budget, contract, leases, agreements and grants.

Ability to: apply techniques, methods, procedures, principles, and regulations; use system applications in a network environment; gather and analyze information; communicate verbally and in writing; and understand and apply human relations principles.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

Possession of a baccalaureate degree from an accredited college or university with major coursework in public or business administration, accounting, finance, economics, social sciences, education, or related field, or other areas closely related to specific department

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Job Code: 1840

program or function.

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Substitution: May substitute up to two (2) years of the required education with additional qualifying experience in program/office/operations management, budget development and/or administration, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

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Deleted: Professional administrative/management experience in the functional areas of budget, contract, and office management; or other related operations area may be

LICENSE AND CERTIFICATION

None

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PROMOTIVE LINES

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Deleted: on a year-for-year basis (30 semester units/45 quarter units equals one (1) year of experience.)

ORIGINATION DATE: 11/2/61

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AMENDED DATE: 5/26/00, 8/12/09

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REASON FOR AMENDMENT *To accurately reflect the minimum qualifications defined in the most recent job analysis conducted for this job code.*

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BUSINESS UNIT(S): COMMN, SFMTA

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**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Junior Administrative Analyst
Job Code: 1820**

INTRODUCTION

Under supervision, the Junior Administrative Analysis assists with and performs professional level work in analyzing operations of City departments and agencies as they relate to the formulation and execution of the annual budget, grants, legislative/administrative policy, financial/fiscal policy and/or contract administration

DISTINGUISHING FEATURES

Class 1820 Junior Administrative Analyst is the entry-level class of the series performing professional level work in analyzing, researching and reporting functions related to department operations. This class is distinguished from Class 1822 Administrative Analyst in that the latter is the journey level of the series that performs duties of difficult and complex nature related to administrative policy analysis, legislative analysis, economic analysis, budgetary analysis, complex financial/fiscal analysis and reporting, and development/administration of competitive bid processes, contractual agreements or grants

Supervision Exercised: None

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Conducts field surveys and carries out routine research in connection with budget, legislative or management studies and/or performs analysis of actual expenditures compared to the budget or public policy issues.
2. Assists in conducting difficult and complex analysis, procedural, organizational and operational investigations, surveys and/or research relating to department/agency operations.
3. Provides routine information to departmental personnel on the preparation of budget and policy documents, reports, demographics and program implementation.
4. Assists in preparing reports and proposals.
5. Assists in preparing budget and program delivery calendars.
6. Assists in compiling budget requests, making budget presentations, performing cost analysis and preparing program reports.
7. Prepares, generates, and updates budget documents, contract reports, surveys, databases and mailing lists.
8. Tracks and coordinates revenue and expenditures, grants, program budgets, and other funds.
9. Assists with the preparation and submittal of supplemental budget requests.
10. Assists in preparation and coordination of development of legislative proposals and/or

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statewide initiatives.

11. Prepares graphs and charts for presentations.
12. Assists in the preparation of quarterly and year-end financial, program and budget, and legislative reports.
13. Assists in review, processing and monitoring of contracts and contract certification processes.
14. Inputs and maintains data in computerized system and generates computerized reports.
15. Maintains contract files, and other contract documents and certificates, and monitors validity of documents.
16. Performs related duties as assigned

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: Principles and processes of finance, accounting, budgeting, contracts, and the legislative process; practices and principles of administrative and management techniques.

Ability to: Conduct surveys and perform routine research; collect, research, and analyze data; interact with departmental personnel to obtain and furnish information on budget/grants, contracts, legislative and procedural matters; prepare and write reports and proposals.

Skill to: Utilize computers for word-processing, databases, Internet, e-mail and various spread sheet software.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

1. Possession of a baccalaureate degree from an accredited college or university; AND one (1) year of professional experience in budget analysis, financial analysis and reporting, legislative/policy analysis, or contract/grant administration; OR
2. Possession of a baccalaureate degree from an accredited college or university in accounting, finance, public or business administration, economics, urban studies, public policy or a related field

SUBSTITUTION: ~~May substitute up to 2 years of the required education with additional qualifying experience in budget analysis, financial analysis and reporting, legislative/policy analysis, or contract/grant administration. One year (2,000 hours) of additional qualifying~~

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Title: Junior Administrative Analyst
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experience will be considered equivalent to 30 semester/45 quarter units.

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LICENSE AND CERTIFICATION

None

PROMOTIVE LINES

To: 1822 Administrative Analyst

From: Original Entrance Examination

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ORIGINATION DATE: January 12, 1961

AMENDED DATE: July 23, 1999; July 2, 2004, 8/13/09

REASON FOR AMENDMENT *To accurately reflect the minimum qualifications defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN
