

Approved Fm1

E3.4.1

County of Monterey Request to Classify Form

Instructions: Please submit the attached request to classify form for each new position or reallocation of an existing position. Submit the form to Ariana Viveros, Associate Personnel Analyst, Central Human Resources Division. Central HR will notify you if additional information is needed. You must include a current and proposed organizational chart with each form.

Department/Division: Assessor/County Clerk/Recorder (ACCR)

Budget Unit Number: 1180 / 8004

Request for: ☐ New Allocation

☒ Reallocation of Existing Position –

☒ Position is vacant

Management Analyst II (PC# 14C300001)

Department Contact for Information: Name: Gerta McClay

Phone: 759-6602

Estimated % of total time spent on task/duty	DESCRIPTION OF TASKS/DUTIES TO BE PERFORMED Use a separate paragraph for each task or duty. Attach additional sheets as necessary. <u>Do not</u> include verbiage directly from the job description.
15	Directly manage and supervise professional, paraprofessional, technical and/or clerical staff; provide training to staff in accounting applications, budget administration and state and federal laws affecting fiscal operations; plan and organize work of staff; provide staff development training; select and evaluate staff.
10	Coordinate and maintain fiscal, billing, and contract accounting systems and procedures to assure the quality and technical accuracy of all fiscal programs.
10	Prepare or supervise the preparation of a variety of complex periodic and special accounting reports, financial statements, special financial studies, technical financial reports, budgets, cost analyses, rate studies and projections.
10	Provide planning and oversight for Departmental budgeting; develop timelines and coordinate the financial portion of the budget; provide budgetary and fiscal advice to the Department Head and management staff; prepare budget for the Department or a portion related to the major area of responsibility.
10	Responsible to oversee and draw up, execute, monitor, and keep timely contracts to ensure compliance with established standards, policies, and legal guidelines, such as PSA's BSC's, SC's, BPO's, LPO's, PO's DO's

Continued on next page

10	Responsible to draft and/or review reports and other written communication to the Board of Supervisors or other public bodies, such as Board Report and Board Orders, Electronic Recording Presentations, and Historical Society and Genealogist Presentations
10	Direct and monitor Departmental accounting systems, financial controls and accounting operations including general ledger and cost accounting, financial reporting and internal auditing. Analyze Departmental financial needs and develop systems for controlling expenditures
5	Research, interpret, and communicate information regarding legal statutes, projects, or administrative requirements, such as that required for the recording and filing of real property documents, vital records, and miscellaneous filings, the negotiation and execution of contracts, and personnel and departmental needs or requirements
5	Analyze and evaluate Department and County accounting and auditing policies, practices and procedures. Develop and recommend changes as needed. Consult with Department Heads, managers, administrators, business organizations and/or other interested parties about Department and County policies, practices and procedures
5	Maintain a current knowledge of industry standards for public finance administration, cost and fiscal control accounting, budget preparation and management, financial reporting, forecasting and financial analysis.
5	Communicate and interpret fiscal management goals, objectives, policies, procedures, standards, programs and services to departmental management and support staff. Advise management team, Department Heads and administrators regarding fiscal policies, goals, objectives, standards and programs.
5	Research and analyze computerized accounting, budgeting, billing, program management and other management information system requirements. Work with Departments, managers and/or administrators to recommend, develop and implement systems.

JUSTIFICATION FOR REQUEST:

Prior to June 2010, the ACCR's financial and budgeting functions were performed by an Auditor-Controller Analyst, residing in the Auditor-Controller's Office. With the elimination of that position, the work was split and became of the duties of the Assistant County Clerk/Recorder (ACCR) for the County Clerk/Recorder Unit) and the Administrative Services Officer (ASO), or the Assessor's Unit. In addition to already full workloads, these two positions have had to learn not only County financial and budgeting processes, but an entirely new system (Advantage). The budgeting process itself has become more burdensome, and requires a finance-functional expert to manage for the department. At the same time, the department has lost positions due to budget costs, placing additional burdens on the two impacted managers.

With the reallocation of the MAII position to an FMII position, not only will the department (both units) benefit from the expertise of a trained finance person, but the ACCR and the ASO will be able to again dedicate appropriate time and energies to their respective management functions.

The department as a whole is conducting a reorganization study. As a result, some functions will be shared between the two units, the FMII position will report directly to the Assessor/County Clerk Recorder and will perform finance and budget-related work for both units.

Is there any other position(s) within the department performing in a similar capacity assigned comparable duties to this position?

No

Please attach a copy of the current and proposed organizational chart depicting the proposed position.


Department Head Signature

7/6/2012
Date

Departmental HR Analyst: Gerta McClay

Date: 7/6/2012


Class Recommendation: Finance Manager II

Class Code: 28B93

FOR CENTRAL HUMAN RESOURCES USE ONLY:

Approved Class Title: Finance Manager I

Class 20B95

CAO Classification At 

7/17/12

Distribution of Central HR Job Class Determination:

☐ Requesting Department Head - **copy**

☐ Ebby Johnson

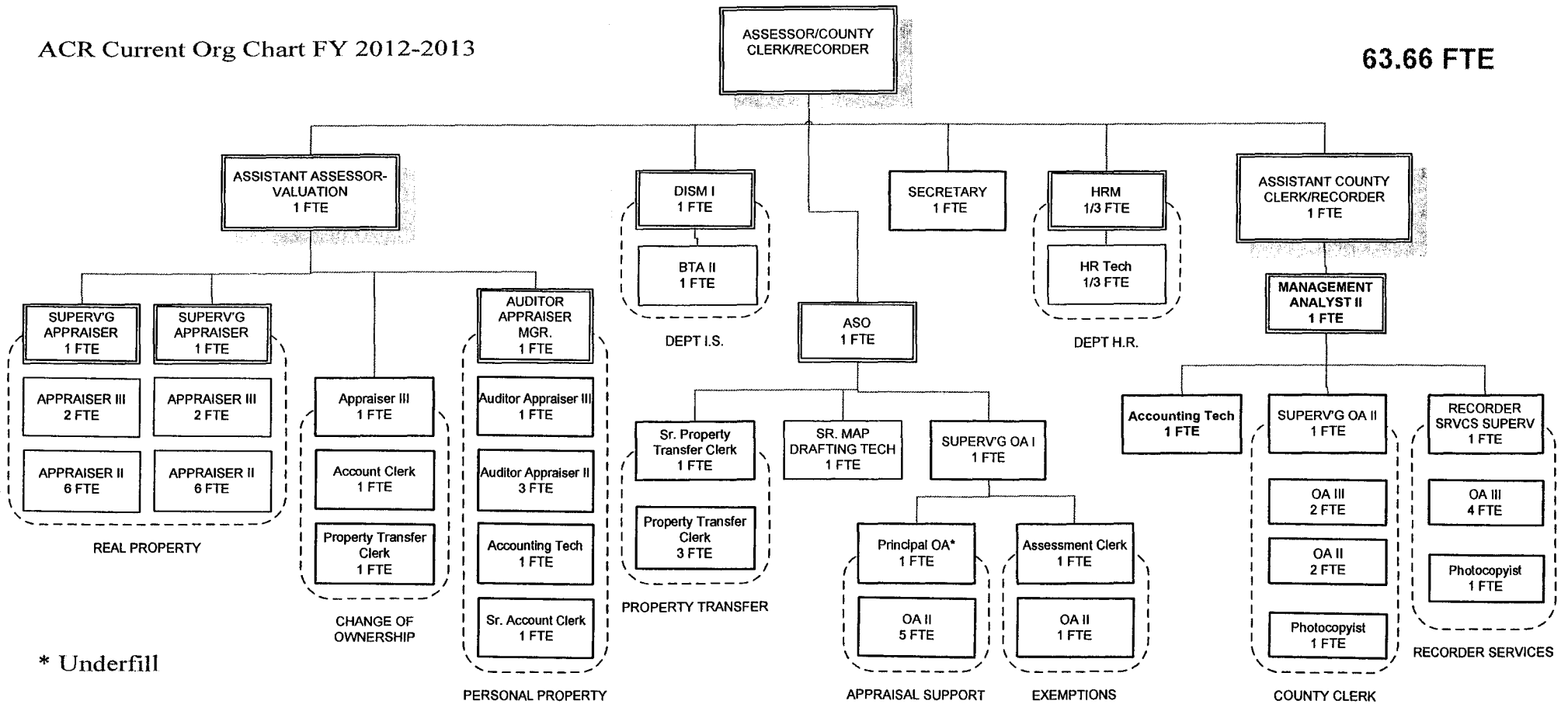
☐ Departmental HR Analyst - **copy**

County Administrative Office - **original**

☐ Central HR Analyst - **copy**

ACR Current Org Chart FY 2012-2013

63.66 FTE



* Underfill

