

**Augmentations/Reallocations
Request to Classify Form**
(This form is not needed for a change in FTE)



Instructions: Please submit the Request to Classify Form for each new position or reallocation of an existing position to Irene Espinoza, in the Human Resources Department (HRD). HRD will notify you regarding the status of your request or if additional information is necessary. **Please attach a copy of the current and proposed organizational chart depicting the proposed position. Both organizational charts must reflect current FTE's (filled and vacant).**

Department/Division: Auditor-Controller – General Accounting

Current Budget Unit Number: 1110 - 8374

New Budget Unit Number:
(if applicable) _____

Department Contact for Information: Name: Nairi Davis

Phone: 831-755-5092

Select Corresponding Position Status Maintenance Code (PSTS) for Position Status Maintenance Transaction (PSMT):		Insert # of Requested Allocations (same class only)
<input type="checkbox"/> New Allocation		
<input type="checkbox"/> Reallocation, Filled Position	<i>[Insert Current Classification Title]</i>	
<input checked="" type="checkbox"/> Reallocation, Vacant Position	Auditor-Controller Analyst I	1

Estimated % of total time spent on task/duty (column should equal 100%)	DESCRIPTION OF TASKS/DUTIES TO BE PERFORMED Use a separate paragraph for each task or duty. Attach additional sheets as necessary. <u>Do not include verbiage directly from the class specification.</u> <i>(Please note rows will expand to allow for thorough description of task/duty)</i>
45%	Document approval (IETs, CRs, JVs, REYEs, JVAs, BGEXs, BGRVs, Debt GAXs).
5%	Preparation of the following reports: <ul style="list-style-type: none">• Insurance Compliance Certification related to Debt• Budget Compliance Certification related to Debt• Annual Continuing Disclosure Report• Annual Debt Transparency Report

2%	Review and posting of debt related transactions (i.e. debt refunding)
5%	Prepare and present accounting and financial reporting related trainings to County Finance Managers and Users.
3%	Maintain and improve accounting and finance skills through training courses, conferences and seminars.
10%	Assist with accounting process documentation, annual fiscal policy and procedure updates.
5%	Obtain, review and certify the monthly outside bank reconciliations prepared and submitted by department finance staff. Be responsible for maintaining the list of authorized signers for outside bank accounts by the departments.
20%	Assist in annual financial close, CAFR preparation process and new GASB implementations.
5%	Assist the Auditor-Controller Analyst I, who oversees the Cost Allocation Plan with COWCAP preparation, gathering reports etc., and performing initial analysis.

JUSTIFICATION FOR REQUEST: Describe what changes have occurred (i.e., new legislative mandates, departmental reorganization, new services, new equipment, etc.) that necessitate the need for an additional position. Explain why duties cannot be absorbed by another existing position. Describe consequences or ramifications if the position is not approved. *[Please note field(s) will expand to allow space for justification]*

The Auditor-Controller's Office (ACO) is requesting the reallocation of a vacant Auditor-Controller Analyst I to improve the organizational structure within the General Accounting Division. In an effort to increase efficiencies in our processes and implement procedures that assist our department in fulfilling its mission, the reallocation of an ACO Analyst to an Accountant-Auditor III, will allow us to establish a sound organizational structure in which each ACO Analyst is supported by an Accountant-Auditor III.

As a result of this restructure, management is currently evaluating the reassignment of certain tasks by redelegating less complex areas from Analysts to Accountant-Auditor IIIs, which will provide an opportunity for cross-training within the General Accounting Division. The Analyst group will focus on more complex and advanced tasks while establishing a sound review process over the areas delegated to Accountant-Auditor IIIs.

Currently the General Accounting Division includes five Analysts and three Accountant-Auditor IIIs. The restructuring will provide the opportunity for our Office to continue to develop strong financial policies and produce reliable and timely information. By allowing each ACO Analyst to be supported by an Accountant-Auditor III, we expect to continue to deliver high-quality work while establishing a strong, and independent review process within all areas of the General Accounting Division. The ACO Analyst supervising the new Accountant-Auditor III, will become a valuable source for the professional development of this new staff member.

The ACO is constantly looking for ways to improve process efficiencies and documentation. The establishment of four teams with specified areas of responsibility will assist us with this goal.

Were the new duties previously performed by another position(s)?

☒ No ☐ Yes (If yes, what is/are the job title(s) of the other position(s)?)

No new duties

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

☐ No ☒ Yes (If yes, what is/are the job title(s) of the other position(s)?)

Accountant Auditor III

Has reappportioning duties among currently available positions to avoid adding an additional position been considered?

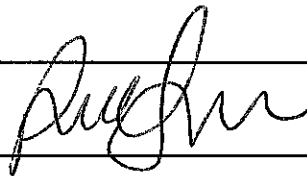
☒ No ☐ Yes (If no, explain why this is not a viable alternative)

The request is for a reallocation not a new position.

DEPARTMENT HEAD:

Comments:

Department Head
Signature:



Date:

10/29/19

DEPARTMENTAL HR ANALYST:

Class Recommendation:

Accountant Auditor III

Class
Code:

20B22

Departmental HR
Analyst Signature:



Date:

10/29/19

FOR HRD USE ONLY:

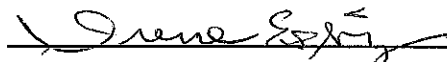
Approved Class Title:

ACCOUNTANT AUDITOR III

Class
Code:

20B22

HRD Classification
Analyst Signature:



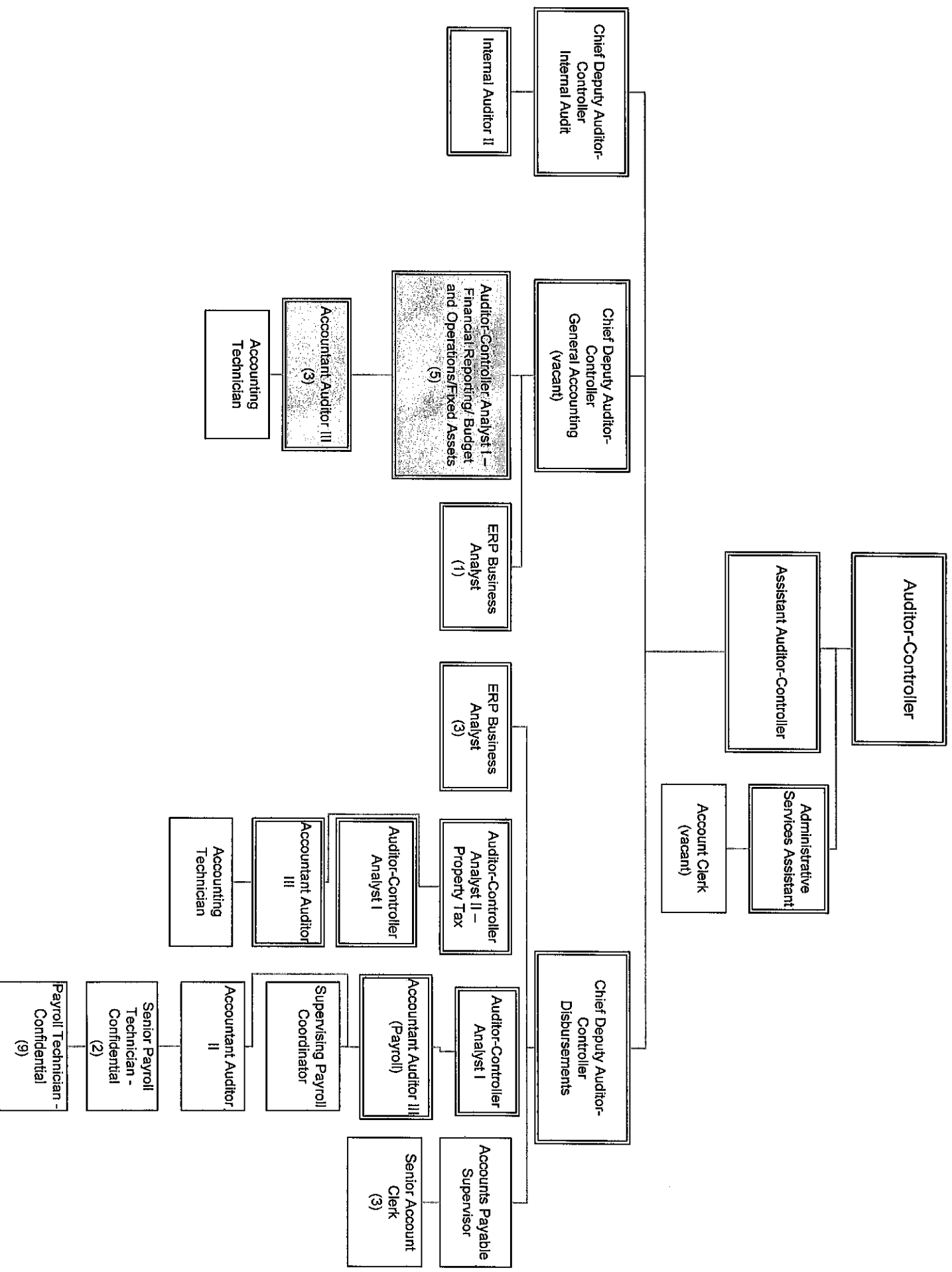
Date:

11/4/19

Distribution of HRD Job Class Determination:

- ☐ Rocio Quezada (CAO - Admin. Secretary) ☐ CAO Budget Analyst
☐ Departmental HR Analyst

Auditor-Controller 2019 – 2020 Organization Chart



Auditor-Controller 2019 – 2020 Proposed Organization Chart

