

Civil Service Commission



Jed Nicholson *Commission President, District 1*

Lesley Santos *District 2*

Erica Flores Baltodano *Commission Vice President, District 3*

David Warren *District 4*

Robert Bergman *District 5*

Tami Douglas-Schatz *Commission Secretary*

AGENDA

County of San Luis Obispo Civil Service Commission Regular Session Meeting

Wednesday November 29, 2023 @ 9:00 a.m.

1055 Monterey Street, Suite D-271, San Luis Obispo, CA 93408

1. Call to Order / Flag Salute / Roll Call

2. Public Comment Period

Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the President. Presentations are limited to three minutes per individual.

3. Minutes

The following draft minutes are submitted for approval:

- a. September 27, 2023
- b. October 25, 2023

4. Reports

Commission President
Commission Counsel
Commission Outside Counsel
Commission Secretary

5. Request to Approve Civil Service Commission Schedule

- a. Civil Service Commission Regular Meeting Schedule for 2024

6. Request to Approve New Job Specification(s):

- a. Assistant Chief Deputy Probation Officer

7. Request to Approve Revised Job Specification(s):

- a. Chief Deputy Probation Officer
- b. Assessment Technician I/II/III/IV

Civil Service Commission

8. Public Comment on Closed Session Item

Members of the public wishing to address the Civil Service Commission on Closed Session matters agendaized here may do so when recognized by the President. Presentations are limited to three minutes per individual.

9. CLOSED SESSION: Conference with County Labor Negotiator regarding Civil Service Rule Update. (Gov Code Section 54957.6): Agency designated representative: Tami Douglas-Schatz, or designee

10. Adjournment

Civil Service Commission



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Tami Douglas-Schatz *Commission Secretary*

Minutes

County of San Luis Obispo Civil Service Commission Regular Session Meeting

Wednesday, September 27, 2023 @ 9:00 a.m.
1055 Monterey Street, Suite D-271, San Luis Obispo, CA 93408

Present: Commissioners: Vice President Baltodano, Commissioner Bergman, Commissioner Santos, Commissioner Warren

Staff: Commission Secretary Tami Douglas-Schatz
Commission Clerk Shaley Salsbury

County Counsel: Jon Ansolabehere

Absent: Commissioners: President Nicholson
Outside Counsel: Steve Simas

1. Call to Order / Flag Salute / Roll Call

Commission Vice President Baltodano called the meeting to order at 9:00am and led the flag salute. Roll was called. Commission President Nicholson was absent.

2. Public Comment Period

Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the Vice President. Presentations are limited to three minutes per individual. There were no public comments.

3. Minutes

The following draft minutes are submitted for approval:
a. August 23, 2023

Civil Service Commission

35 The minutes for August 23, 2023, were considered. Commission Clerk Shaley Salsbury
36 requested to amend the minutes to correct the spelling of "Theresa Schultz," Senior Labor
37 Representative for SLOCEA. Vice President Baltodano invited public comment; there was none.
38 Commissioner Bergman motioned to approve the minutes as amended. Commissioner Warren
39 seconded the motion. The motion to approve the minutes as amended carried 4-0-1.
40

41 4. Reports

42
43 **Commission Vice President** – None

44 **Commission Counsel** – None

45 **Commission Secretary** – Ms. Douglas-Schatz reported no scheduling changes.
46

47 5. Request to Approve Revised Job Specification(s):

- 48 a. Legal Clerk, Legal Clerk – Confidential, and Supervising Legal Clerk
49

50 Principal Human Resources Analyst Michael Hobbs introduced the revised specifications,
51 noting the changes included the addition of the entry level position in the series, and transition
52 of Supervising Legal Clerk I to Legal Clerk III to create the career series. Mr. Hobbs noted that
53 the proposed language update was initiated after a request for DSS specific classifications from
54 the Department of Social Services. While the study did not result in department specific
55 classifications, the review did lead Human Resources to update the classification while retaining
56 the broad class across multiple departments.
57

58 County Counsel, Jon Ansolabehere, noted that per Rule 5 of the Civil Service Commission Rule
59 Book, the Commission has the purview to review classifications, but not underlying
60 recruitments, therefore department specific notices presented during a recruitment were not
61 subject to review by the Commission.
62

63 Commissioner Santos noted that lines 53, 55, and 56 of page 5a.031 seemed redundant, and
64 questioned why the word "modern" was included in line 70, and "fundamental" on line 76 of
65 page 5a.023.
66

67 Vice President Baltodano invited public comment.
68

69 Comments were given by department representatives and current Legal Clerks including: Devin
70 Drake, Social Services Director; Rita Neal, County Counsel; Robert Reyes, Chief Probation
71 Officer; Christine Malone, Assistant Director Child Support Services; Victoria O’Keeffe, Sheriff-
72 Coroner Administrative Services Manager; Tiffani Johansing, District Attorney Department
73 Administrator; Taj D’Entremont, Human Resources Analyst; Theresa Schultz, SLOCEA Senior
74 Labor Representative; Mark Zeltmann, Deputy Director of Human Resources; Michelle Read,
75 Legal Clerk for DSS; Cassidy Dolin, Legal Clerk for DSS; Melody Hanshew, Legal Clerk for DSS;
76 Christopher Rico, Legal Clerk for DSS, and Sandra Krijakin, Supervising Legal Clerk for DSS. Due
77 to the nature of the comments and discussion during this portion of the meeting, other public
78 comments may have been made without introduction by name and title and therefore may not

Civil Service Commission

79 be included in this record; a digital record exists and will remain as the official, complete record
80 of all proceedings by the Civil Service Commission.

81
82 Commission Counsel Jon Ansolabehere advised that per Civil Service Commission Rule 5.03 the
83 Commission could agendaize an item for a future meeting to order Human Resources to conduct
84 a position study.

85
86 Commission Vice President Baltodano motioned to approve the changes to the Legal Clerk,
87 Legal Clerk – Confidential, and Supervising Legal Clerk specifications as presented.
88 Commissioner Santos seconded the motion. The motion to approve the specifications as
89 presented carried 4-0-1.

90
91 Commission Vice President Baltodano motioned to agendaize an item for the next Civil Service
92 Commission meeting to discuss directing the Human Resources Director to prepare a position
93 study. The motion was seconded by Commissioner Warren. The motion to agendaize this item
94 carried 4-0-1.

96 7. Public Comment on Closed Session Item

97 Members of the public wishing to address the Civil Service Commission on Closed Session
98 matters agendaized here may do so when recognized by the Vice President. Presentations are
99 limited to three minutes per individual.

100
101 Hearing no public comment, Vice President Baltodano moved to Closed Session.

103 8. CLOSED SESSION: Conference with County Labor Negotiator regarding Civil Service Rule 104 Update. (Gov Code Section 54957.6): Agency designated representative: Tami Douglas- 105 Schatz, or designee

106
107 Vice President Baltodano stated that there was no reportable action in Closed Session.

109 9. Adjournment

110
111 Vice President Baltodano adjourned the meeting at 11:30 a.m.

112
113 *** Note: These minutes reflect official action of the Civil Service Commission. A digital record exists
114 and will remain as the official, complete record of all proceedings by the Civil Service Commission.**

Civil Service Commission



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Erica Flores Baltodano *Commission Vice President, District 3*

David Warren *District 4*

Robert Bergman *District 5*

Tami Douglas-Schatz *Commission Secretary*

Minutes

County of San Luis Obispo Civil Service Commission

Regular Session Meeting

Wednesday, October 25, 2023 @ 9:00 a.m.

1055 Monterey Street, Suite D-271, San Luis Obispo, CA 93408

Present: Commissioners: President Nicholson, Vice President Baltodano, Commissioner Bergman, Commissioner Santos, Commissioner Warren

Staff: Commission Secretary Tami Douglas-Schatz
Acting Commission Clerk Rosa Reyes

County Counsel: Jon Ansolabehere

Outside Counsel: Steve Simas

Absent: None

1. Call to Order / Flag Salute / Roll Call

Commission President Nicholson called the meeting to order at 9:00am and led the flag salute. Roll was called. All Commissioners were present.

2. Public Comment Period

Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the President. Presentations are limited to three minutes per individual. There were no public comments.

3. Reports

Commission President – None

Commission Counsel – None

Commission Secretary – Ms. Douglas-Schatz reported minutes from the previous Commission meeting were not included in the agenda packet. These minutes would be available at the next

Civil Service Commission

36 Commission meeting. Additionally, no new dates for hearings were needed. The hearings dates
37 already scheduled were confirmed.

38

39 **4. Consideration of a directive to Human Resources to restudy the Legal Clerk positions in** 40 **the Department of Social Services**

41

42 Mark Zeltmann, Deputy Director Human Resources, introduced this item along with Michael
43 Hobbs, Principal Human Resources Analyst, and Mark McKibben, Principal Human Resources
44 Analyst. Mr. Zeltmann recapped the highlights from the September 27, 2023, Commission
45 meeting. Mr. Hobbs provided a thorough description of the analysis of the study conducted of
46 the Legal Clerks at the Department of Social Services and the conclusion.

47

48 President Nicholson invited public comment. Melody Hanshew, Legal Clerk III, Sandra Krijakin,
49 Supervising Legal Clerk, Rita Neal, County Counsel, and Theresa Schultz, Senior Labor
50 Representative for SLOCEA all made public comments regarding this item.

51

52 Vice President Baltodano made a motion to not direct Human Resources to do another position
53 study for the department at this time. Commissioner Santos seconded the motion. The motion
54 carried 5-0-0.

55

56 **5. Public Comment on Closed Session Item**

57

58 Members of the public wishing to address the Civil Service Commission on Closed Session
59 matters agendized here may do so when recognized by the President. Presentations are limited
60 to three minutes per individual. Hearing no public comment, President Nicholson moved to
61 Closed Session.

62

63 **6. Closed Session –Public Employee Discipline (per Government Code Section 54957(b)):** 64 **Hearing and deliberations regarding Appeal #A22-02**

65

66 President Nicholson stated that there was no reportable action in Closed Session.

67

68 **7. Adjournment**

69

70 President Nicholson adjourned the meeting.

71

72 *** Note: These minutes reflect official action of the Civil Service Commission. A digital record exists**
73 **and will remain as the official, complete record of all proceedings by the Civil Service Commission.**

Civil Service Commission



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2024 Regular Session Meeting Dates

County of San Luis Obispo Civil Service Commission
Regular monthly meetings are held on the 4th Wednesday at 9:00 A.M.
1055 Monterey Street, Suite D-271, San Luis Obispo, CA 93408

January 24, 2024

February 28, 2024

March 27, 2024

April 24, 2024

May 22, 2024

June 26, 2024

July 24, 2024

August 28, 2024

September 25, 2024

October 23, 2024

*November 20, 2024

*December 18, 2024

***Adjusted due to holiday**

Note: If extenuating circumstances arise, following prior authorization from the Commission President and with compliance to the Brown Act, the meeting date/time/location may change.



TO: Civil Service Commission

DATE: November 29, 2023

FROM: Taj D'Entremont, Principal Human Resources Analyst

SUBJECT: New Classification: Assistant Chief Deputy Probation Officer
Revised Classification: Chief Deputy Probation Officer
Department: Probation
Appointing Authority: Robert Reyes, Chief Probation Officer

RECOMMENDATION

It is recommended that the Commission approve a new class specification for Assistant Chief Deputy Probation Officer (ACDPO), and revisions to the class specification for Chief Deputy Probation Officer (CDPO).

BACKGROUND

Since the inception of the CDPO position in 2010, new state and federal mandates have required the CDPO to take on responsibility for more global duties in the organization. As demands on Probation have increased, the CDPO requires additional support in managing day-to-day operations of an assigned division.

In addition, these same changes in responsibility are creating a larger than previously realized gap between the experience level of Supervising Deputy Probation Officers (SDPO) and CDPOs. Adding a mid-level management position will bridge this gap and allow for more effective succession planning in the Probation Department.

DISCUSSION

Probation's mission is to be the alternative to incarceration. Probation is expected to protect the community, support the court system, assist crime victims, help rehabilitate individuals, and operate a safe and secure Juvenile Hall. Probation serves the critical role of being a connector

in the justice system, both as a connector of system partners as well as a connector of services and supervision to address the needs of justice involved youth and adults on probation.

Under the direction of the Assistant Chief Probation Officer (ACPO) and Chief Probation Officer (CPO), the CDPO has been utilized to direct the operations, resources, and personnel of an assigned division to ensure that the division carries out the mission and statutory mandates of the Probation Department. They have also been tasked with directing and evaluating services, programs, and assigned personnel. However, since 2011 the CDPOs have acquired more global duties within the department as additional legal mandates have been added. These have included the implementation of Public Safety Realignment (2011), juvenile justice realignment (2021), and pretrial services (2022). These state driven reforms have increased the Probation Department's responsibilities including additional quarterly and annual reporting requirements, increased cross departmental executive leadership communication and collaboration, involvement in the Community Corrections Partnership Committee and Juvenile Justice Coordinating Council that provides oversight to local realignment plans, and increased oversight and inspections of juvenile facilities. Additionally, CDPOs are the primary representatives for capital projects unique to the Probation Department, liaisons for the courts, law enforcement agencies, and treatment/community providers, and lead their assigned division to achieve the Probation Department's goals, budget performance measures, and serve on a variety committees and task forces involved in the delivery of criminal and juvenile justice services.

As the Probation Department's mandates and responsibilities have increased, the CDPO position requires support in managing the day-to-day operations of an assigned division. The proposed ACDPO will serve as the first-line management position to relieve the CDPO of certain day-to-day operational activities including managerial oversight of multiple units, services delivery, and employee management within an assigned division. This ACDPO will also serve to translate the strategic vision set by executive management into actionable plans, ensuring effective implementation at the operational level and provide the necessary guidance, coordination, and supervision to facilitate the smooth functioning of daily operations, while aligning them with the overarching Probation Department's mission and objectives.

Furthermore, the Probation Department has identified a significant knowledge gap from those who were promoted to the CDPO assignment from the SDPO ranks. The SDPO serves to provide day-to-day supervisory oversight of a group of officers and administrative staff, but does not have authority over an entire program, unit, or division. The SDPO focuses on working with employees including coaching, mentoring, enforcement of Probation Department policies,

prioritizing daily work and assuring the correct work is being done, writing employee performance evaluations, and court report review and approval. Due to the current leadership structure, SDPOs have limited opportunity to develop the management skills necessary for a successful transition into executive management. The ACDPO position will offer incumbents an opportunity to develop, and strengthen their strategic thinking, problem-solving, communication, and leadership abilities, which will enable them to be successful in advancing their career.

The department anticipates adding two (2) ACDPO positions to its Position Allocation List (PAL) upon approval of this class specification by both the Civil Service Commission and the Board of Supervisors.

Revisions in the class specification for CDPO were simply to ensure there was clarity in the differentiation between the definition and duties of the CDPO and the ACDPO.

RESULT

The approval of a new class specification for ACDPO will allow those currently in CDPO positions to shift their focus towards addressing the broader needs of the Probation Department and provide a first-line manager responsible for overseeing day-to-day operations in assigned units.

Additionally, the ACDPO will serve as a crucial link between executive management and frontline employees, and strengthen the Probation Department's succession planning efforts.

OTHER AGENCY INVOLVEMENT

The Probation Department, the Administrative Office, and Human Resources were involved in the revisions to the proposed class specifications and concur with the revisions as proposed.

Attachments:

1. Assistant Chief Deputy Probation Officer
2. Chief Deputy Probation Officer – Revisions Redlined
3. Chief Deputy Probation Officer – Revisions Accepted
4. Probation Department Current Organization Chart
5. Probation Department Proposed Organization Chart

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

3

4

5 **ASSISTANT CHIEF DEPUTY PROBATION OFFICER**

6

7 **DEFINITION:**

8 Under direction, the Assistant Chief Deputy Probation Officer is responsible to plan, organize, and direct
9 the operations and activities of a group of probation units or detention facility (or facilities) of the
10 Probation Department; supervise and evaluate the performance of a group of Supervising Deputy
11 Probation Officers and other staff; and perform administrative duties, and other related work as
12 required.

13

14 **DISTINGUISHING CHARACTERISTICS:**

15 The Assistant Chief Deputy Probation Officer is responsible for assigned operational activities and
16 services within a Probation division. Incumbents may report to the Assistant Chief Probation Officer,
17 and/or Chief Deputy Probation Officer. Incumbents are working managers in that they perform both
18 supervisory and administrative duties. The Assistant Chief Deputy Probation Officer differs from the
19 Supervising Deputy Probation Officer in that the former is responsible for the day-to-day supervision of
20 Probation units within a division.

21

22 **REPRESENTATIVE DUTIES:**

23 (Not in order of importance)

- 24 • Manages the day-to-day operations and activities of assigned unit(s), a program, or youth
25 detention facilities of the Probation Department; ensure unit activities comply with established
26 laws, codes, ordinances, regulations, policies and procedures;
- 27 • Assist in the development and implementation of programs, projects, services, goals, systems,
28 objectives, and activities;
- 29 • Supervise and evaluate the performance of assigned personnel; provide consultation to staff in
30 resolving difficult issues and complex cases; assist with the recruitment, hiring, and selection of
31 employees and recommend transfers, reassignment, termination, and disciplinary actions;

32 coordinate subordinate work assignments and review work to ensure compliance with
33 established standards, requirements, and procedures; and develop and conduct training
34 activities;

35 • Assist with the development, implementation, and enforcement of policies and procedures in
36 accordance with federal and state law, County policy and rules, Department objectives and goals,
37 and best practices adopted by the probation profession;

38 • Assist with monitoring and evaluating unit activities and related probation and correctional
39 functions for effectiveness and operational efficiency; participate in the development and
40 implementation of programs, policies, and procedures to enhance effectiveness and operational
41 efficiency of unit activities;

42 • Serve as a liaison between assigned personnel, law enforcement agencies and outside agencies;
43 ensure proper and timely resolution of issues and problems related to assigned units, probation
44 services, correctional functions, and assistance to justice involved individuals;

45 • Confer with a Chief Deputy Probation Officer concerning probation operations and activities;
46 respond to staff and public input and inquiries concerning assigned units needs and issues;
47 resolve issues and conflicts, and provide detailed and technical information concerning related
48 laws, codes, standards, ordinances, regulations, policies and procedures; and investigate
49 complaints and recommend corrective action;

50 • Prepare and/or direct the preparation of reports, correspondence, and research according to
51 establish timelines;

52 • Represent the department in meetings with commissions, committees, community agencies, and
53 other public groups;

54 • May serve as Acting Chief Deputy Probation Officer in their absence.

55

56 In addition to the above when assigned to the Juvenile Hall and camp facilities:

57 • Provide guidance in unusual situations or emergencies;

58 • Ensure the proper levels of security are maintained within the facility and camp;

59 • Perform various administrative tasks for facility/camp operation and maintenance;

60 • Prepare the facility/camp for annual inspections;

61 • Ensure facility/camp is compliant with Title 15 and 24 of the California Administrative Code.

62

63 **EMPLOYMENT STANDARDS:**

64 **Knowledge of:**

- 65 • Policies, objectives and management of operations and activities of an assigned unit(s) of the
- 66 Probation department;
- 67 • County and departmental policies, procedures, rules, and regulations;
- 68 • Modern methods of probationary and correctional functions, including requirements for effective
- 69 placement, treatment, referral, care, and custody of convicted juveniles and adults;
- 70 • Practices, procedures, and techniques involved in the development and implementation of
- 71 division, probationary and correctional programs, projects, services, goals, systems, objectives,
- 72 and activities;
- 73 • Legal terminology, processes, and procedures related to assigned probationary and correctional
- 74 functions;
- 75 • Applicable local, State and Federal laws, codes, ordinances, regulations, policies, and procedures
- 76 related to probation work and youth correctional facilities;
- 77 • Principles and practices of administration, supervision, training, budget preparation, and financial
- 78 controls;
- 79 • Effective verbal and written communication skills;
- 80 • Effective interpersonal skills, including tact, patience, and courtesy;
- 81 • Basic public relations techniques.

82

83 **Ability to:**

- 84 • Plan, organize, and direct the operations and activities of an assigned unit(s) within a division of
- 85 the Probation Department;
- 86 • Coordinate and direct communications, resources and personnel to meet County probationary
- 87 and correctional needs, and ensure smooth and efficient unit activities;
- 88 • Oversee the development, modification, and implementation of unit programs, projects,
- 89 functions, services, goals, objectives, systems, and activities;
- 90 • Supervise, train, and evaluate the performance of assigned personnel;
- 91 • Interpret, apply, explain and ensure compliance with applicable County, State and Federal rules,
- 92 laws, codes, regulations, ordinances, policies, and procedures;
- 93 • Participate in the review, analysis, and coordination of the probationary and correctional

- 94 caseload;
- 95 • Ensure proper and timely resolution of unit issues and problems;
 - 96 • Establish and maintain effective relationships with citizens, other employees, outside agencies,
97 and public officials, exercising good judgement and tact;
 - 98 • Operate a computer and assigned office equipment;
 - 99 • Enforce the law firmly, tactfully, and impartially, and deal courteously with the public;
 - 100 • Exercise good judgement in handling potentially hostile individuals, and deescalate conflicts;
 - 101 • Appropriately use firearms and other devices, for personal security, and protection of others;
 - 102 • Model effective communication, both verbally and in writing;
 - 103 • Accurately analyze a situation and adopt an effective course of action;
 - 104 • Prepare comprehensive narrative and statistical reports;
 - 105 • Attend or facilitate a variety of meetings as assigned; represent assigned unit(s) at various
106 committees, boards, task forces, councils and commissions as required; attend and participate in
107 training sessions as directed.

108

109 **EDUCATION AND EXPERIENCE:**

110 A combination of education, training, and experience resulting in the required knowledge, skills, and
111 abilities. An example of qualifying education and experience includes:

112

113 Graduation from an accredited four-year college or university with a bachelor's degree. In addition, four
114 years of increasingly responsible experience working in the field of Probation, including three years as a
115 Supervising Deputy Probation Officer or equivalent.

116

117 **LICENSES/CERTIFICATES:**

118 A valid driver's license is required at the time of application. A valid CALIFORNIA driver's license is required
119 at the time of appointment and must be maintained throughout employment.

120

121 Successful completion of the Laws and Arrest component of Penal Code 832 training prior to appointment.

122

123 Successful completion of Board of State and Community Corrections, Standards and Training for
124 Corrections, certified Manager Core Academy within one year of appointment.

125

126 **PHYSICAL/PSYCHOLOGICAL EXAM:**

127 Must meet minimum peace officer standards as specified in California Government Code Sections 1029
128 and 1031, including but not limited to: not currently on probation for a misdemeanor; no prior felony
129 convictions (unless fully pardoned); good moral character as determined by thorough background
130 investigation (this includes a polygraph examination and/or computer voice stress analysis); submission
131 of fingerprints for purpose of a criminal record check; and found to be free from any physical, emotional,
132 or mental condition, including bias against race or ethnicity, gender, nationality, religion, disability, or
133 sexual orientation, that might adversely affect the exercise of the powers of a peace officer.

134

135 **SPECIAL SUBCLASS RECRUITMENT**

136 Recruitments for this classification may be conducted according to the special divisions or programs in
137 which the vacancy exists and the requirements of the position.

138

139 This class specification generally describes the duties and responsibilities characteristic of the
140 positions(s) within this class. The duties of a particular position within a multi-position class may vary
141 from the duties of other positions within the class. Accordingly, the essential functions of a particular
142 position (whether it be a multi-position class or a single-position class) will be identified and used by
143 medical examiners and hiring authorities in the selection process. If you have any questions regarding
144 the duties or the working conditions of the position, please contact the Human Resources Department
145 at 805.781.5959.

146

147 Adopted: 00-00-00

148 BOS Approved: 00-00-00

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo-County**

3
4 **CHIEF DEPUTY PROBATION OFFICER**

5
6 **DEFINITION:**

7 Under general direction, the Chief Deputy Probation Officer is responsible to plan, organize, direct, and
8 coordinate the activities and administration of a major division within the Probation Department at the
9 executive management level; coordinate and direct communications, resources, and personnel in
10 support of probation services, and ensure smooth and efficient division operations; assign, supervise
11 and evaluate the performance of assigned personnel; and perform other related work as required.

12
13 **DISTINGUISHING CHARACTERISTICS:**

14 The Chief Deputy Probation Officer, reporting to the Assistant Chief Probation Officer, performs complex
15 administrative functions with minimal direction and supervision. This position is distinguished from the
16 Assistant Chief Deputy Probation Officer in that the former serves as the administrative head of a
17 probation services division while the latter assists the Chief Deputy Probation Officer in managing the
18 activities and services of units within a division.

19
20 **REPRESENTATIVE DUTIES:**

21 (Not in order of importance)

- 22 • Plan, organize, direct, and supervise the operations and activities of a major assigned division;
23 establish and maintain department timelines and priorities; interpret and implement department
24 and division policies and procedures; manage internal affairs investigations, citizen complaints,
25 and implement disciplinary action in accordance with County procedures; and ensure related
26 functions and activities comply with established ~~s~~State and ~~f~~Federal, laws, regulations, and
27 ordinances;
- 28 • Develop~~Evaluate, develop,~~ monitor, and analyze goals, objectives, policies ~~and,~~ procedures,
29 programs, and activities to ensure divisional goals are achieved; and assist in development of the
30 Department's strategic plan;

- 31 • Consult with and advise the Chief Probation Officer and Assistant Chief Probation Officer on
32 matters related to the activities of the assigned probation division;
- 33 • Supervise and evaluate the performance of assigned staff; interview and select employees;
34 recommend appointments, transfers, reassignments, terminations, and disciplinary actions;
35 assign employee duties, and review work to ensure accuracy, completeness, and compliance with
36 established standards, requirements, and procedures;
- 37 • Monitor and analyze division programs, activities, and related probationary, correctional, and
38 enforcement functions for financial effectiveness and operational efficiency; assist in
39 development and preparation of budget; review and analyze budgetary and financial data; and
40 controls and authorize expenditures in accordance with established limitations;
- 41 • Provide consultation and technical expertise to administrators, personnel, outside agencies, and
42 the public concerning division operations, activities, and related probation and correctional
43 functions; respond to inquiries, resolve issues and conflicts; and provide detailed and technical
44 information concerning related laws, codes, standards, regulations, policies, and procedures;
- 45 • ~~Coordinate communications of~~Serve as a liaison and coordinate divisional activities ~~within~~
46 ~~the~~between Department divisions, County staff, law enforcement organizations, courts, and
47 various local, State, and Federal agencies; and may represent Department at conferences and
48 before state and local organizations;
- 49 • Coordinate ~~the preparation of and review~~ technical and administrative reports; and ~~assure~~ensure
50 mandated reports are completed and submitted to appropriate local, State or Federal agency
51 according to established timelines;
- 52 • May serve as the Acting Chief Probation Officer in the absence of the Chief and Assistant Chief
53 Probation Officer.

54
55 **EMPLOYMENT STANDARDS:**

56 **Knowledge of:**

- 57 • Planning, organization, and direction of assigned division operations and activities;
- 58 • Practices, procedures, and techniques involved in the development and implementation of
59 division programs, projects, functions, services, goals, objectives, systems, and activities;
- 60 • Effective practices of employee supervision and evaluation;

- 61 • Modern methods of probationary and correctional functions, including requirements for effective
- 62 placement, treatment, referral, care, and custody of convicted juveniles and adults;
- 63 • Legal terminology, processes, and procedures related to probationary and correctional functions;
- 64 • ~~California Penal Code and Welfare Institutions Code;~~
- 65 • Applicable local, State, and Federal laws, codes, ordinances, regulations, policies, and procedures
- 66 related to probation work and youth correctional facilities;
- 67 • County and departmental policies, procedures, rules, and regulations;
- 68 • ~~Principles and practices of administration;~~
- 69 • Principles of, supervision, training and budget preparation, and financial controls;
- 70 • Public relations techniques.

71

72 **Ability to:**

- 73 • Plan, organize, control, and direct the operations and activities of an assigned division;
- 74 • Coordinate and direct communications, resources, and personnel to meet County probation and
- 75 correctional needs and ensure smooth and efficient division activities;
- 76 • Supervise, train, and evaluate the performance of assigned personnel;
- 77 • Oversee the development, modification, and implementation of division programs, projects,
- 78 functions, services, goals, objectives, systems, and activities;
- 79 • Provide consultation and technical expertise concerning division operations, activities, and
- 80 related probationary and correctional functions;
- 81 • Monitor, analyze, and modify policies, procedures, and programs to enhance the financial
- 82 effectiveness and operational efficiency of an assigned division;
- 83 • Interpret, apply, and explain rules, regulations, policies, and procedures;
- 84 • Collect, interpret, and evaluate budgetary, statistical, and accounting data;
- 85 • Enforce the law firmly, tactfully, and impartially, and deal courteously with the general public;
- 86 • Exercise good judgement in handling potentially hostile individuals, and deescalate conflicts;
- 87 • Appropriately use firearms and other devices, for personal security, and protection of others;
- 88 • Establish and maintain effective relationships with citizens, other employees, outside agencies,
- 89 and public officials, exercising good judgement and tact;
- 90 • Operate a computer and assigned office equipment;
- 91 • Analyze situations accurately, and adopt an effective course of action;

- Prepare comprehensive narrative and statistical reports;
- Model effective communication, both verbally and in writing;
- Apply the principals and values of the department's community-based policing guidelines.

EDUCATION AND EXPERIENCE:

A combination of education, training, and experience resulting in the required knowledge, skills, and abilities. An example of qualifying education and experience includes:

Graduation from an accredited four-year college or university with a bachelor's degree (job-related experience may substitute for the required education). In addition, five years of increasingly responsible experience working in the field of Probation, including three years as a Supervising Deputy Probation Officer or two years as an Assistant Chief Deputy Probation Officer or equivalent.

LICENSES AND CERTIFICATES:

A valid driver's license is required at the time of application. A valid CALIFORNIA driver's license is required at the time of appointment and must be maintained throughout employment.

Successful completion of the Laws and Arrest component of Penal Code 832 training prior to appointment.

Successful completion of Board of State and Community Corrections, Standards and Training for Corrections, certified Manager Core Academy within one year of appointment.

PHYSICAL/PSYCHOLOGICAL EXAM:

Must meet minimum peace officer standards as specified in California Government Code Sections 1029 and 1031, including but not limited to: not currently on probation for a misdemeanor; no prior felony convictions (unless fully pardoned); good moral character as determined by thorough background investigation (this includes a polygraph examination and/or computer voice stress analysis); submission of fingerprints for purpose of a criminal record check; and found to be free from any physical, emotional, or mental condition, including bias against race or ethnicity, gender, nationality, religion, disability, or sexual orientation, that might adversely affect the exercise of the powers of a peace officer.

123 **SPECIAL SUBCLASS RECRUITMENT:**

124 Recruitments for this classification may be conducted according to the special divisions or programs in
125 which the vacancy exists and the requirements of the position.

126
127 This class specification generally describes the duties and responsibilities characteristic of the
128 position(s) within this class. The duties of a particular position within a multi-position class may vary
129 from the duties of other positions within the class. Accordingly, the essential functions of a particular
130 position (whether it be a multi-position class or a single-position class) will be identified and used by
131 medical examiners and hiring authorities in the selection process. If you have any questions regarding
132 the duties or the working conditions of the position, please contact the Human Resources Department
133 at 805.781.5959.

134
135 Adopted: 06-23-10
136 BOS Approved: 07-13-10
137 Revised: 10-28-15
138 03-24-21
139 04-26-23
140 XX-XX-XX

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

3

4

CHIEF DEPUTY PROBATION OFFICER

5

6 **DEFINITION:**

7 Under general direction, the Chief Deputy Probation Officer is responsible to plan, organize, direct, and
8 coordinate the activities and administration of a major division within the Probation Department at the
9 executive management level; coordinate and direct communications, resources, and personnel in
10 support of probation services, and ensure smooth and efficient division operations; assign, supervise
11 and evaluate the performance of assigned personnel; and perform other related work as required.

12

13 **DISTINGUISHING CHARACTERISTICS:**

14 The Chief Deputy Probation Officer, reporting to the Assistant Chief Probation Officer, performs complex
15 administrative functions with minimal direction and supervision. This position is distinguished from the
16 Assistant Chief Deputy Probation Officer in that the former serves as the administrative head of a
17 probation services division while the latter assists the Chief Deputy Probation Officer in managing the
18 activities and services of units within a division.

19

20 **REPRESENTATIVE DUTIES:**

21 (Not in order of importance)

- 22 • Plan, organize, direct, and supervise the operations and activities of a major assigned division;
23 establish and maintain department timelines and priorities; interpret and implement department
24 and division policies and procedures; manage internal affairs investigations, citizen complaints,
25 and implement disciplinary action in accordance with County procedures; and ensure related
26 functions and activities comply with established State and Federal, laws, regulations, and
27 ordinances;
- 28 • Evaluate, develop, monitor, and analyze goals, objectives, policies, procedures, programs, and
29 activities to ensure divisional goals are achieved; and assist in development of the Department's
30 strategic plan;

- 31 • Consult with and advise the Chief Probation Officer and Assistant Chief Probation Officer on
32 matters related to the activities of the assigned probation division;
- 33 • Supervise and evaluate the performance of assigned staff; interview and select employees;
34 recommend appointments, transfers, reassignments, terminations, and disciplinary actions;
35 assign employee duties, and review work to ensure accuracy, completeness, and compliance with
36 established standards, requirements, and procedures;
- 37 • Monitor and analyze division programs, activities, and related probationary, correctional, and
38 enforcement functions for financial effectiveness and operational efficiency; assist in
39 development and preparation of budget; review and analyze budgetary and financial data; and
40 controls and authorize expenditures in accordance with established limitations;
- 41 • Provide consultation and technical expertise to administrators, personnel, outside agencies, and
42 the public concerning division operations, activities, and related probation and correctional
43 functions; respond to inquiries, resolve issues and conflicts; and provide detailed and technical
44 information concerning related laws, codes, standards, regulations, policies, and procedures;
- 45 • Serve as a liaison and coordinate divisional activities between Department divisions, County staff,
46 law enforcement organizations, courts, and various local, State, and Federal agencies; and may
47 represent Department at conferences and before state and local organizations;
- 48 • Coordinate and review technical and administrative reports; and ensure mandated reports are
49 completed and submitted to appropriate local, State or Federal agency according to established
50 timelines;
- 51 • May serve as the Acting Chief Probation Officer in the absence of the Chief and Assistant Chief
52 Probation Officer.

53

54 **EMPLOYMENT STANDARDS:**

55 **Knowledge of:**

- 56 • Planning, organization, and direction of assigned division operations and activities;
- 57 • Practices, procedures, and techniques involved in the development and implementation of
58 division programs, projects, functions, services, goals, objectives, systems, and activities;
- 59 • Effective practices of employee supervision and evaluation;
- 60 • Modern methods of probationary and correctional functions, including requirements for effective
61 placement, treatment, referral, care, and custody of convicted juveniles and adults;

- 62 • Legal terminology, processes, and procedures related to probationary and correctional functions;
- 63 • Applicable local, State, and Federal laws, codes, ordinances, regulations, policies, and procedures
- 64 related to probation work and youth correctional facilities;
- 65 • County and departmental policies, procedures, rules, and regulations;
- 66 • Principles and practices of administration, supervision, training and budget preparation, and
- 67 financial controls;
- 68 • Public relations techniques.

69

70 **Ability to:**

- 71 • Plan, organize, control, and direct the operations and activities of an assigned division;
- 72 • Coordinate and direct communications, resources, and personnel to meet County probation and
- 73 correctional needs and ensure smooth and efficient division activities;
- 74 • Supervise, train, and evaluate the performance of assigned personnel;
- 75 • Oversee the development, modification, and implementation of division programs, projects,
- 76 functions, services, goals, objectives, systems, and activities;
- 77 • Provide consultation and technical expertise concerning division operations, activities, and
- 78 related probationary and correctional functions;
- 79 • Monitor, analyze, and modify policies, procedures, and programs to enhance the financial
- 80 effectiveness and operational efficiency of an assigned division;
- 81 • Interpret, apply, and explain rules, regulations, policies, and procedures;
- 82 • Collect, interpret, and evaluate budgetary, statistical, and accounting data;
- 83 • Enforce the law firmly, tactfully, and impartially, and deal courteously with the public;
- 84 • Exercise good judgement in handling potentially hostile individuals, and deescalate conflicts;
- 85 • Appropriately use firearms and other devices, for personal security, and protection of others;
- 86 • Establish and maintain effective relationships with citizens, other employees, outside agencies,
- 87 and public officials, exercising good judgement and tact;
- 88 • Operate a computer and assigned office equipment;
- 89 • Analyze situations accurately, and adopt an effective course of action;
- 90 • Prepare comprehensive narrative and statistical reports;
- 91 • Model effective communication, both verbally and in writing;
- 92 • Apply the principals and values of the department's community-based policing guidelines.

93 **EDUCATION AND EXPERIENCE:**

94 A combination of education, training, and experience resulting in the required knowledge, skills, and
95 abilities. An example of qualifying education and experience includes:

96

97 Graduation from an accredited four-year college or university with a bachelor's degree (job-related
98 experience may substitute for the required education). In addition, five years of increasingly responsible
99 experience working in the field of Probation, including three years as a Supervising Deputy Probation
100 Officer or two years as an Assistant Chief Deputy Probation Officer or equivalent.

101

102 **LICENSES AND CERTIFICATES:**

103 A valid driver's license is required at the time of application. A valid CALIFORNIA driver's license is
104 required at the time of appointment and must be maintained throughout employment.

105

106 Successful completion of the Laws and Arrest component of Penal Code 832 training prior to
107 appointment.

108

109 Successful completion of Board of State and Community Corrections, Standards and Training for
110 Corrections, certified Manager Core Academy within one year of appointment.

111

112 **PHYSICAL/PSYCHOLOGICAL EXAM:**

113 Must meet minimum peace officer standards as specified in California Government Code Sections 1029
114 and 1031, including but not limited to: not currently on probation for a misdemeanor; no prior felony
115 convictions (unless fully pardoned); good moral character as determined by thorough background
116 investigation (this includes a polygraph examination and/or computer voice stress analysis); submission
117 of fingerprints for purpose of a criminal record check; and found to be free from any physical, emotional,
118 or mental condition, including bias against race or ethnicity, gender, nationality, religion, disability, or
119 sexual orientation, that might adversely affect the exercise of the powers of a peace officer.

120 **SPECIAL SUBCLASS RECRUITMENT:**

121 Recruitments for this classification may be conducted according to the special divisions or programs in
122 which the vacancy exists and the requirements of the position.

123

124 This class specification generally describes the duties and responsibilities characteristic of the
125 positions(s) within this class. The duties of a particular position within a multi-position class may vary
126 from the duties of other positions within the class. Accordingly, the essential functions of a particular
127 position (whether it be a multi-position class or a single-position class) will be identified and used by
128 medical examiners and hiring authorities in the selection process. If you have any questions regarding
129 the duties or the working conditions of the position, please contact the Human Resources Department
130 at 805.781.5959.

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132 Adopted: 06-23-10
133 BOS Approved: 07-13-10
134 Revised: 10-28-15
135 03-24-21
136 04-26-23
137 XX-XX-XX

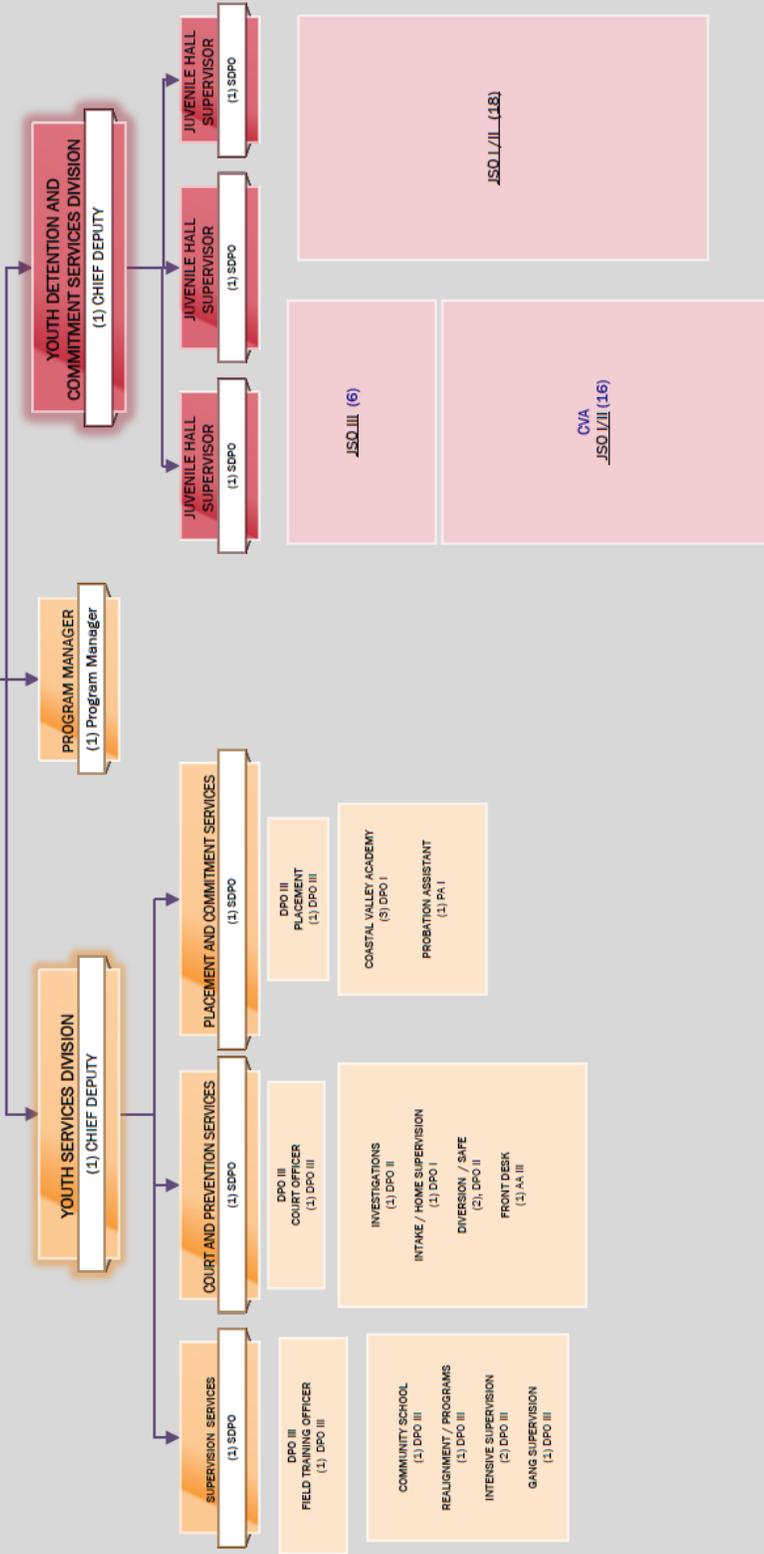
DRAFT

KEY	
	CHIEF & ASSISTANT CHIEF
	SUPPORT SERVICES DIVISION
	ADULT SERVICES DIVISION
	BUDGET & FINANCE DIVISION
	JUVENILE SERVICES DIVISION
	JUVENILE CUSTODY DIVISION

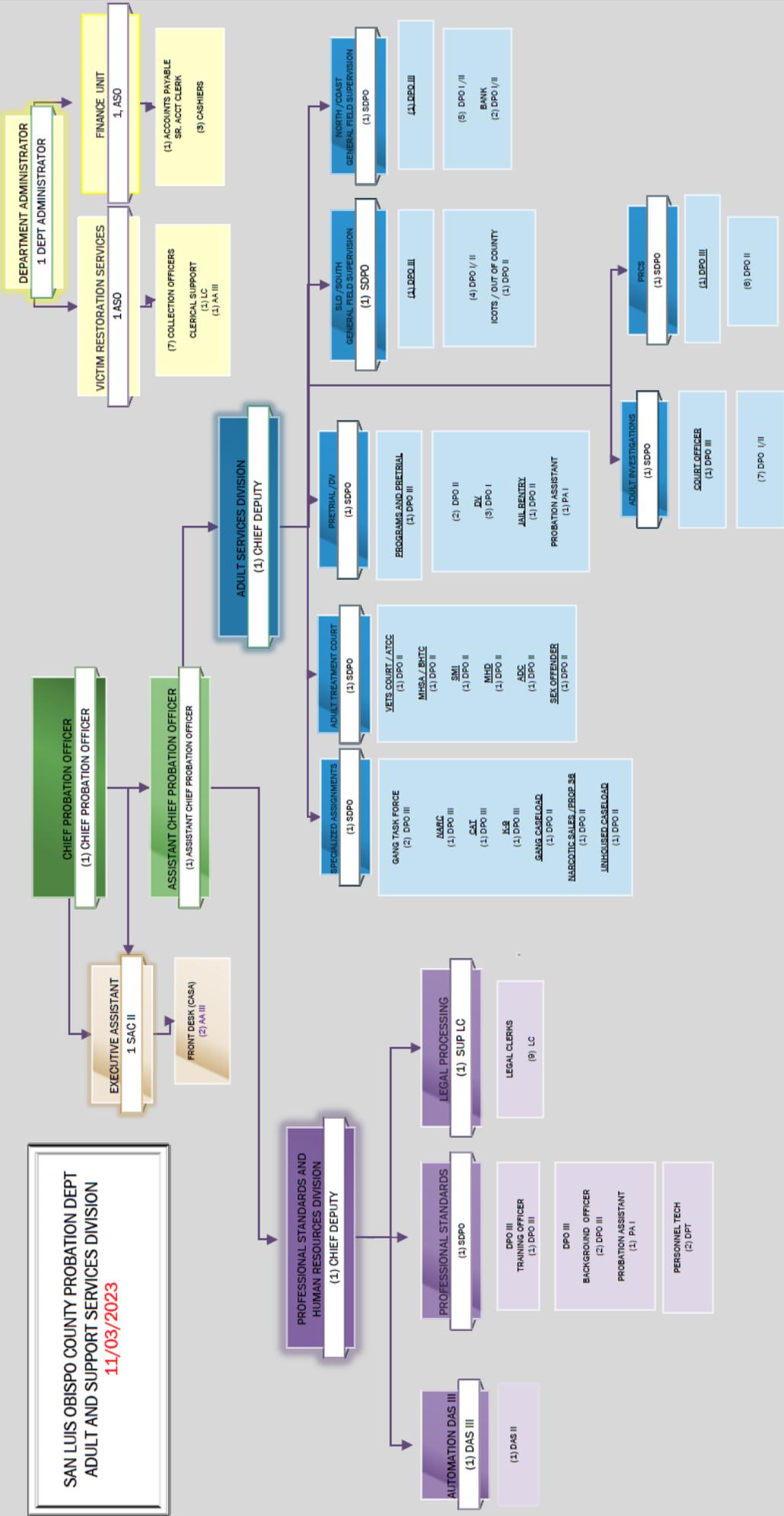


SAN LUIS OBISPO COUNTY PROBATION DEPT
JUVENILE AND CUSTODY DIVISION
11/03/2023

FILLED POSITIONS	VACANT	ALLOCATED
CPO	1	1
ACPO	1	1
CHIEF DEPUTY	4	4
PRG MANAGER	1	1
DEPARTMENT ADMIN	1	1
ASO	2	2
SDPO	14	14
DPO I/II	45	7
DPO III	16	16
JSO III	6	6
JSO I/II	28	6
PERS TECH	2	2
PROBATION ASSIST	1	2
SR. ACCT CKL	1	1
SUPERVING LC	1	1
LEGAL CLERK	9	1
AA III	5	2
DAS	2	2
SAC II	1	1
COLL OFFICER	7	7
FILLED POSITIONS	148	18
		166

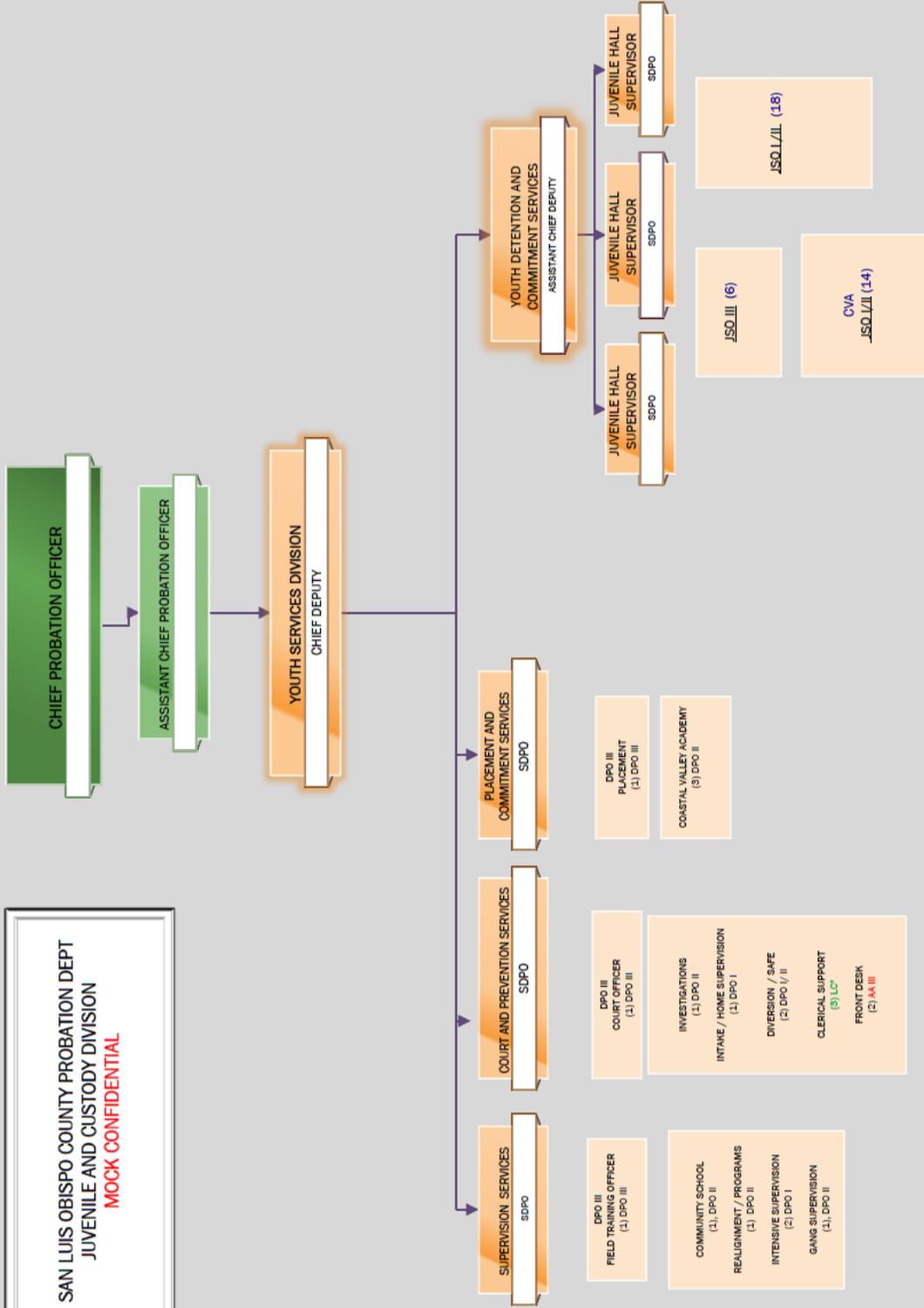


**SAN LUIS OBISPO COUNTY PROBATION DEPT
ADULT AND SUPPORT SERVICES DIVISION
11/03/2023**

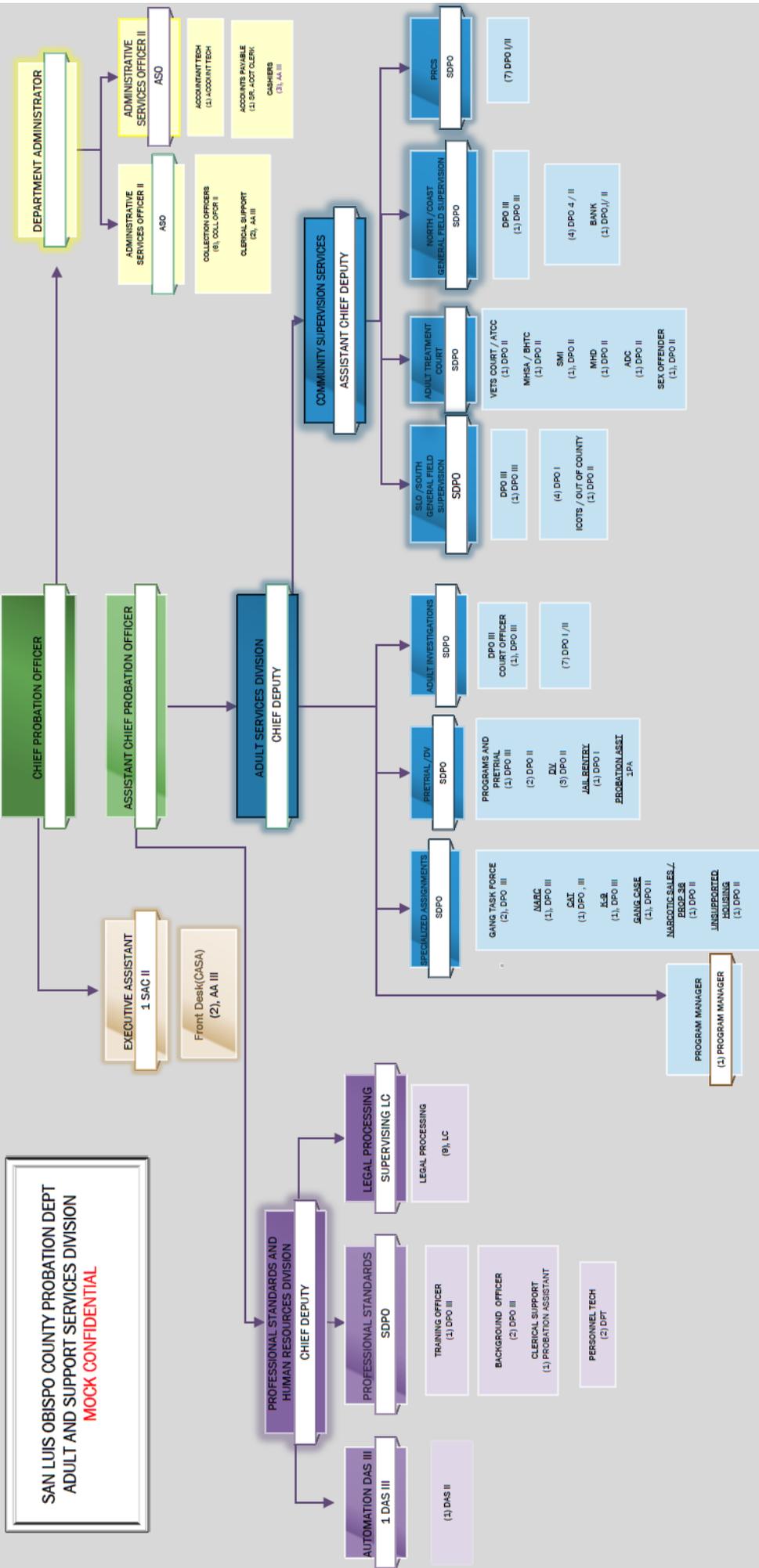


SAN LUIS OBISPO COUNTY PROBATION DEPT
JUVENILE AND CUSTODY DIVISION
MOCK CONFIDENTIAL

KEY	
	CHIEF & ASSISTANT CHIEF
	SUPPORT SERVICES DIVISION
	ADULT SERVICES DIVISION
	BUDGET & FINANCE DIVISION
	JUVENILE SERVICES DIVISION
	JUVENILE CUSTODY DIVISION



FILLED POSITIONS	VACANT	ALLOCATED
CPO	1	1
ACPO	1	1
CHIEF DEPUTY	4	4
ACDP	2	2
PRG MANAGER	1	1
DEPARTMENT ADMIN	1	1
ASO	1	1
SDPO	14	14
DPO I/II	52	2
DPO III	13	13
JSO III	6	6
JSO I/II	32	2
PERS TECH	2	2
SR. ACCT CKL	1	1
LEGAL CLERK	10	10
AA III	7	4
DAS	2	2
SAC II	1	1
COLL OFFICER	7	7
FILLED POSITIONS	158	9
		167





COUNTY OF SAN LUIS OBISPO
DEPARTMENT OF HUMAN RESOURCES

Tami Douglas-Schatz *Director*

TO: Civil Service Commission

DATE: November 29, 2023

FROM: Michael Hobbs, Principal Human Resources Analyst

SUBJECT: Revised Classifications: Assessment Technician I/II/III/IV
Department: Assessor's Office
Appointing Authority: Tom Bordonaro, Jr., County Assessor

RECOMMENDATION

It is recommended that the Commission approve the proposed revisions to the Assessment Technician I/II/III/IV job specifications.

BACKGROUND

The County Assessor's Office discovers, inventories, and values all real and personal property in the county, which is then passed on to the Auditor Controller's Office for tax purposes. Employees in the Assessment Technician I/II/III/IV classifications play an integral role in the Assessor's Office. As defined in the job specifications, Assessment Technicians perform a variety of tax assessment duties to complete and maintain the property tax roll. There are twelve incumbents in the Assessment Technician I/II/III/IV class series.

DISCUSSION

The Assessor's Office has identified a need to update the job specification to ensure that the language accurately describes the duties. The key revision to the job specification is the removal of supervisory language, as employees in the Assessment Technician I/II/III/IV classifications are not

supervisors. For instance, the Assessment Technician IV classification currently contains language such as “subordinate staff,” and “may supervise.” The supervisory language is being removed as the true supervisory responsibilities lie with the Assessment Technician Supervisor classification. Additionally, the phrase, “Acts as section lead worker,” for Assessment Technician IV (line 68 of Attachment 1) has been interpreted as a requirement for incumbents to act as a lead worker. However, it is not always necessary for Assessment Technician IV incumbents to act as a section lead worker and the interpretation of this language prevents employees from being promoted. Adding in the word “may” clarifies that employees are not always required to act in this capacity and removes this barrier for promotions for otherwise qualified employees. Other revisions to the specification language further clarify the duties, abilities, and distinguishing characteristics of each level in the series.

RESULT

The proposed specification revisions more accurately and clearly describe the duties of the Assessment Technician I/II/III/IV classifications and will allow for appropriate employee succession and promotion within in the classification series. The revisions do not add or remove any duties to the specifications, and do not change the minimum qualifications.

OTHER AGENCY INVOLVEMENT

The Assessor’s Office and San Luis Obispo County Employees’ Association (SLOCEA) were involved in the revisions to the specifications and concur with the specification changes as proposed.

ATTACHMENTS:

1. Assessment Technician I/II/III/IV redline version
2. Assessment Technician I/II/III/IV clean version
3. Organizational Chart

HUMAN RESOURCES DEPARTMENT

~~San Luis Obispo County~~County of San Luis Obispo

ASSESSMENT TECHNICIAN I, II, III & IV

~~(Career Class Series)~~

DEFINITION:

Under the direction of the section supervisor, performs a variety of tax assessment duties to complete and maintain the property tax roll; and provides support and service to other office sections and the public; ~~and does other related duties as required.~~

DISTINGUISHING CHARACTERISTICS:

~~The~~ **Assessment Technician I:** ~~classification~~ This is the entry level ~~position~~ in the series. Incumbents work under supervision while learning general assessment duties, policies, and procedures.

~~The~~ **Assessment Technician II:** ~~classification~~ This is the journey level ~~position~~ in the series. Incumbents work under general supervision and perform progressively more difficult assessment service duties.

~~The~~ **Assessment Technician III:** ~~classification~~ This is the advanced journey level ~~position in the series.~~ Incumbents work under direction and perform more complex assessment service duties; may assist in training and mentoring staff; ~~may act as a specialist.~~

~~The~~ **Assessment Technician IV:** ~~classification~~ This is the advanced level ~~position in the series.~~ Incumbents work under direction and perform the most complex assessment duties; may provide work direction and ~~or~~ coordination for ~~subordinate~~ staff; may act as a specialist or section lead worker.

REPRESENTATIVE DUTIES:

(Not in order of importance)

- 32 • Learns policies and procedures and performs basic assessment duties.
- 33 • Enters, scans, researches, and maintains a large variety and volume of assessment data with a
- 34 high degree of accuracy.
- 35 • ~~Assists/ and educates staff and the public about various assessment situations in person, by~~
- 36 ~~telephone, and through correspondence; explains the application of various Revenue and~~
- 37 ~~Taxation Codes, and other codes, statutes, and regulations.~~
- 38 • Answers phones and assists the public with general assessment questions.
- 39 • Reads and interprets legal descriptions.
- 40 • Prepares a variety of reports and correspondence.
- 41 • Performs basic cash handling and clerical accounting duties.
- 42 • May be called upon to assist or serve on special projects and/or teams.
- 43 • Performs other related duties as required.

44
45 **In addition, Assessment Technician II:**

- 46 • Evaluates assessment enrollments and determines appropriate course of action.
- 47 • Interprets and calculates assessment values supplied by an appraiser.
- 48 • ~~Assists/educates staff and the public about various assessment situations in person, by telephone,~~
- 49 ~~and through correspondence; explains the application of various Revenue and Taxation Codes,~~
- 50 ~~and other codes, statutes, and regulations.~~
- 51 • Assists in the design, development, and implementation of systems, workflow, procedures and/or
- 52 policies to be used in the Assessor's office.
- 53 • Prepares and/or processes basic pending revisions to assessment roll.
- 54 • Provides assistance to appraisers and auditor-appraisers with field work/ and canvassing.

55
56 **In addition, Assessment Technician III:**

- 57 • Assists in training and mentoring subordinate staff.
- 58 • May assist in developing computer programs directly related to assessment projects.
- 59 • Prepares and/or processes corrections to the supplemental roll; prepares and/or processes
- 60 complex pending revisions to assessment roll.
- 61 • May lead in the development and implementation of procedures to be used in the Assessor's
- 62 office.

- May lead in the design, development, and implementation of systems and workflow to be used in the Assessor's office.

In addition, Assessment Technician IV:

- Creates and processes revisions to the roll.
- May act~~Acts~~ as a section~~an~~ lead worker, leading in special projects as assigned; ~~distributes~~ distributing work assignments; ~~advises~~ advising supervisor of operations staffing and resource needs; ~~or provides~~ providing input on staff performance.
- May act as a specialist, providing subject matter expertise in one or more functional areas or processes.
- ~~When directed, may supervise the section in the absence of the Assessment Tech Supervisor.~~

EMPLOYMENT STANDARDS:

Knowledge of:

- ~~Oral and written communication skills~~
- ~~Interpersonal skills using tact, patience, and courtesy~~
- Mathematics including fractions and percentages
- General office procedures, practices, and machines
- Personal computer usage and common software
- Common methods of describing real property

In addition, Assessment Technician II:

- Provisions of the California State Constitution, Revenue and Taxation Code, and other codes and statutes pertaining to the assessment of property for ad valorem taxation purposes
- Assessor's office organization, procedures, and standards as well as strategic direction and goals
- Computer applications pertinent to assessment service functions

In addition, Assessment Technician III:

- Principles of leadership and training

In addition, Assessment Technician IV:

- Complex property tax rules and systems

Ability to:

- Follow written and oral-verbal instructions
- Convey assessment laws and procedures accurately, tactfully, and concisely, both orally-verbally and in writing
- Interpret, apply, and explain rules, laws, regulations, policies and procedures
- Analyze assessment service problems, prepare sound recommendations, and adopt effective courses of action
- Perform assigned duties under pressure and with many interruptions while maintaining a balance between accuracy and quantity
- Use sound judgment in researching, interpreting, applying, and explaining appropriate laws, codes, ordinances, regulations, policies, procedures, and guidelines
- Read and interpret maps and property descriptions
- Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision – Values Statement
- Develop and maintain positive working relationships; communicate and work effectively with others in a diverse population
- Foster a spirit of teamwork and support when interacting with staff and others
- Operate a computer and assigned office equipment
- Maintain a safe and orderly work area

In addition, Assessment Technician II:

- Compile and ~~or~~ provide assessment reports

In addition, Assessment Technician III:

- Train and mentor subordinate-staff
- Lead and coordinate special projects
- Process all roll revisions
- Process all supplemental corrections

125 **In addition, Assessment Technician IV:**

- 126 • Lead and coordinate the work of subordinate staff
- 127 • Provide instruction to staff
- 128 • Communicate department needs to assigned supervisor
- 129 • Create roll revisions

130

131 **EDUCATION AND EXPERIENCE:**

132 A combination of education, training, and experience resulting in the required knowledge, skills, and

133 abilities. An example of qualifying education and experience includes:

134

135 **All levels:** Graduation from high school or possession of a G.E.D. certificate.

136

137 **In addition to the above:**

138 **Assessment Technician I: Either A:** One (1) year of clerical experience in an Assessor's office, Tax

139 Collector's office, Auditor/Controller's office, Clerk/Recorder's office or similar experience in a real estate

140 related field. **OR B:** Two (2) years of clerical work which includes computer experience.

141

142 **Assessment Technician II: Either A:** One (1) year of experience in a position comparable to an

143 Assessment Technician I in County of San Luis Obispo, San Luis Obispo County. **OR B:** Two (2) years of

144 related experience at the level of Assessment Technician I in an Assessor's office, Tax Collector's office, or

145 Auditor/Controller's office.

146

147 **Assessment Technician III: Either A:** Two (2) years of experience in a position comparable to an

148 Assessment Technician II in County of San Luis Obispo, San Luis Obispo County. **OR B:** Three (3) years of related

149 experience at the level of Assessment Technician II in an Assessor's office, Tax Collector's office, or

150 Auditor/Controller's office.

151 **Assessment Technician IV: Either A:** Two (2) years of experience in a position comparable to an

152 Assessment Technician III in County of San Luis Obispo, San Luis Obispo County. **OR B:** Three (3) years of

153 related experience at the level of Assessment Technician III in an Assessor's office, Tax Collector's office,

154 or Auditor/Controller's office.

156 **LICENSES AND CERTIFICATES:**

157 A valid driver's license is required at the time of application. A valid **CALIFORNIA** driver's license is
158 required at the time of appointment and must be maintained throughout employment.

161 **SPECIAL SUBCLASS RECRUITMENT:**

163 Recruitment for this classification may be conducted according to the special divisions or programs in
164 which the vacancy exists and the requirements of the position.

166 This class specification generally describes the duties and responsibilities characteristic of the position(s)
167 within this class. The duties of a particular position within a multi-position class may vary from the duties
168 of other positions within the class. Accordingly, the essential functions of a particular position (whether it
169 be a multi-position class or a single-position class) will be identified and used by medical examiners and
170 hiring authorities in the selection process. If you have any questions regarding the duties, employment
171 standards, or working conditions of the position, please contact the Human Resources Department at
172 805.781.5959.

174 Adopted: 04-29-98

175 Revised: 05-25-11

176 04-26-23

177 XX-XX-XX

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

3
4
5 **ASSESSMENT TECHNICIAN I, II, III & IV**

6 **(Class Series)**

7
8 **DEFINITION:**

9 Under the direction of the section supervisor, performs a variety of tax assessment duties to complete
10 and maintain the property tax roll, and provides support and service to other office sections and the
11 public..

12
13 **DISTINGUISHING CHARACTERISTICS:**

14
15 **Assessment Technician I:** This is the entry level in the series. Incumbents work under supervision while
16 learning general assessment duties, policies, and procedures.

17
18 **Assessment Technician II:** This is the journey level in the series. Incumbents work under general
19 supervision and perform progressively more difficult assessment service duties.

20
21 **Assessment Technician III:** This is the advanced journey level in the series. Incumbents work under
22 direction and perform more complex assessment service duties; may assist in training and mentoring
23 staff.

24
25 **Assessment Technician IV:** This is the advanced level in the series. Incumbents work under direction
26 and perform the most complex assessment duties; may provide work direction and coordination for
27 staff; may act as a specialist or lead worker.

28
29 **REPRESENTATIVE DUTIES:**

30 (Not in order of importance)

- 31
 - Learns policies and procedures and performs basic assessment duties.

Attachment 2

- Enters, scans, researches, and maintains a large variety and volume of assessment data with a high degree of accuracy.
- Assists and educates staff and the public about various assessment situations; explains the application of various Revenue and Taxation Codes, and other codes, statutes, and regulations.
- Answers phones and assists the public with general assessment questions.
- Reads and interprets legal descriptions.
- Prepares a variety of reports and correspondence.
- Performs basic cash handling and clerical accounting duties.
- May be called upon to assist or serve on special projects or teams.
- Performs other related duties as required.

In addition, Assessment Technician II:

- Evaluates assessment enrollments and determines appropriate course of action.
- Interprets and calculates assessment values supplied by an appraiser.
- Assists in the design, development, and implementation of systems, workflow, procedures and policies to be used in the Assessor's office.
- Prepares and processes basic pending revisions to assessment roll.
- Provides assistance to appraisers and auditor-appraisers with field work and canvassing.

In addition, Assessment Technician III:

- Assists in training and mentoring staff.
- May assist in developing computer programs directly related to assessment projects.
- Prepares and processes corrections to the supplemental roll; prepares and processes complex pending revisions to assessment roll.
- May lead in the development and implementation of procedures to be used in the Assessor's office.
- May lead in the design, development, and implementation of systems and workflow to be used in the Assessor's office.

In addition, Assessment Technician IV:

- Creates and processes revisions to the roll.

- May act as a lead worker, leading in special projects as assigned, distributing work assignments, advising supervisor of operations staffing and resource needs, or providing input on staff performance.
- May act as a specialist, providing subject matter expertise in one or more functional areas or processes.

EMPLOYMENT STANDARDS:

Knowledge of:

- Mathematics including fractions and percentages
- General office procedures, practices, and machines
- Personal computer usage and common software
- Common methods of describing real property

In addition, Assessment Technician II:

- Provisions of the California State Constitution, Revenue and Taxation Code, and other codes and statutes pertaining to the assessment of property for ad valorem taxation purposes
- Assessor's office organization, procedures, and standards as well as strategic direction and goals
- Computer applications pertinent to assessment service functions

In addition, Assessment Technician III:

- Principles of leadership and training

In addition, Assessment Technician IV:

- Complex property tax rules and systems

Ability to:

- Follow written and verbal instructions
- Convey assessment laws and procedures accurately, tactfully, and concisely, both verbally and in writing
- Interpret, apply, and explain rules, laws, regulations, policies and procedures

Attachment 2

- 93 • Analyze assessment service problems, prepare sound recommendations, and adopt effective
- 94 courses of action
- 95 • Perform assigned duties under pressure and with many interruptions while maintaining accuracy
- 96 • Use sound judgment in researching, interpreting, applying, and explaining appropriate laws,
- 97 codes, ordinances, regulations, policies, procedures, and guidelines
- 98 • Read and interpret maps and property descriptions
- 99 • Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision –
- 100 Values Statement
- 101 • Develop and maintain positive working relationships; communicate and work effectively with
- 102 others in a diverse population
- 103 • Foster a spirit of teamwork and support when interacting with staff and others
- 104 • Operate a computer and assigned office equipment
- 105 • Maintain a safe and orderly work area
- 106

107 **In addition, Assessment Technician II:**

- 108 • Compile and provide assessment reports
- 109

110 **In addition, Assessment Technician III:**

- 111 • Train and mentor staff
- 112 • Lead and coordinate special projects
- 113 • Process all roll revisions
- 114 • Process all supplemental corrections
- 115

116 **In addition, Assessment Technician IV:**

- 117 • Lead and coordinate the work of staff
- 118 • Provide instruction to staff
- 119 • Communicate department needs to assigned supervisor
- 120 • Create roll revisions
- 121

122 **EDUCATION AND EXPERIENCE:**

Attachment 2

A combination of education, training, and experience resulting in the required knowledge, skills, and abilities. An example of qualifying education and experience includes:

All levels: Graduation from high school or possession of a G.E.D. certificate.

In addition to the above:

Assessment Technician I: Either A: One (1) year of clerical experience in an Assessor's office, Tax Collector's office, Auditor/Controller's office, Clerk/Recorder's office or similar experience in a real estate related field, **OR B:** Two (2) years of clerical work which includes computer experience.

Assessment Technician II: Either A: One (1) year of experience in a position comparable to an Assessment Technician I in County of San Luis Obispo,, **OR B:** Two (2) years of related experience at the level of Assessment Technician I in an Assessor's office, Tax Collector's office, or Auditor/Controller's office.

Assessment Technician III: Either A: Two (2) years of experience in a position comparable to an Assessment Technician II in County of San Luis Obispo, **OR B:** Three (3) years of related experience at the level of Assessment Technician II in an Assessor's office, Tax Collector's office, or Auditor/Controller's office.

Assessment Technician IV: Either A: Two (2) years of experience in a position comparable to an Assessment Technician III in County of San Luis Obispo,, **OR B:** Three (3) years of related experience at the level of Assessment Technician III in an Assessor's office, Tax Collector's office, or Auditor/Controller's office.

LICENSES AND CERTIFICATES:

A valid driver's license is required at the time of application. A valid **CALIFORNIA** driver's license is required at the time of appointment and must be maintained throughout employment.

SPECIAL SUBCLASS RECRUITMENT:

Attachment 2

153 Recruitment for this classification may be conducted according to the special divisions or programs in
154 which the vacancy exists and the requirements of the position.

155
156 This class specification generally describes the duties and responsibilities characteristic of the position(s)
157 within this class. The duties of a particular position within a multi-position class may vary from the duties
158 of other positions within the class. Accordingly, the essential functions of a particular position (whether it
159 be a multi-position class or a single-position class) will be identified and used by medical examiners and
160 hiring authorities in the selection process. If you have any questions regarding the duties, employment
161 standards, or working conditions of the position, please contact the Human Resources Department at
162 805.781.5959.

163
164 Adopted: 04-29-98

165 Revised: 05-25-11

166 04-26-23

167 xx-xx-xx

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Assessor's Office
San Luis Obispo County
FY 2023-24

