

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*

Jamie Russell *Commission Secretary*

AGENDA

**County of San Luis Obispo Civil Service Commission
Regular Session Meeting**

Wednesday July 24, 2024 @ 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. January 19, 2024
- b. January 24, 2024
- c. March 27, 2024
- d. April 23, 2024
- e. April 24, 2024
- f. May 6, 2024
- g. May 7, 2024
- h. May 22, 2024

4. Reports

Commission President
Commission Counsel
Commission Outside Counsel
Commission Secretary

5. Receive and File: Annual Report

- a. Annual Report 2023

Civil Service Commission

6. Request to Approve by Consent:

- a. Application of approved preamble language to minimum qualifications and ability to identify and remove or replace language describing allowed formulaic substitutions

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

- a. Paralegal (Revised)
- b. Senior Paralegal (New)

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

- a. Sheriff's Deputy Director – Support Services Bureau

9. 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.

10. Closed Session –Public Employee Discipline (per Government Code Section 54957(b)): Hearing and deliberations regarding Appeal # A23-05

11. Adjournment

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica 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 Special Session Meeting

Friday January 19, 2024 @ 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 Jamie Russell
Commission Clerk Shaley Salsbury

Outside Counsel: Steve Simas

Absent: County Counsel: Jon Ansolabehere

1. Call to Order / Flag Salute / Roll Call

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

2. Public Comment on Closed Session Item

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

SLOCEA Senior Labor Representative Theresa Schultz introduced SLOCEA Executive Director Emily Landis to the Commission. Following public comment, President Nicholson moved to Closed Session.

3. CLOSED SESSION: Public Employee Discipline (per Government Code Section 54957(b)): Hearing and deliberations regarding Appeal #A22-04

Civil Service Commission

46
47
48
49
50
51
52
53
54

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

4. Adjournment

President Nicholson adjourned the meeting at 5:23p.m.

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

DRAFT

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica 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, January 24, 2024 @ 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
Commission Clerk Shaley Salsbury

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 9:02am and led the flag salute. Roll was called. All Commissioners were present.

2. Election of Officers

Commissioner Santos nominated Commissioner Baltodano for Vice President. Commissioner Bergman seconded. The motion to elect Commissioner Baltodano as Commission Vice President passed 4-0-1, with Commissioner Baltodano abstaining.

Commission Vice President Baltodano nominated Commissioner Nicholson for Commission President. Commissioner Bergman seconded the motion. The motion to elect Commissioner Nicholson as Commission President carried 4-0-1, with Commissioner Nicholson abstaining.

Civil Service Commission

46
47
48
49
50
51
52
53
54
55
56
57
58
59
60
61
62
63
64
65
66
67
68
69
70
71
72
73
74
75
76
77
78
79
80
81
82
83
84
85
86
87
88
89

3. 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 was no public comment.

4. Minutes

The following draft minutes are submitted for approval:

- a. November 29, 2023

Commissioner Warren motioned to approve the minutes as presented. Commission Vice President Baltodano seconded the motion. The motion to approve as presented passed 5-0-0.

- b. December 11, 2023
- c. December 12, 2023
- d. December 13, 2023

Commission President Nicholson suggested review and approval of the December meetings jointly. Commission Vice President Baltodano motioned to approve the minutes as presented. Commissioner Bergman seconded the motion. The motion to approve the minutes from December 11, 2023, December 12, 2023, and December 13, 2023, passed 5-0-0.

5. Reports

Commission President - None

Commission Counsel - None

Commission Outside Counsel - Commission Counsel recognized Commission Clerk Shaley Salsbury for her work supporting the Commission throughout the last Commission hearing.

Commission Secretary - Tami Douglas-Schatz introduced Emily Landis, Executive Director of SLOCEA.

Principal Human Resources Analyst Frank Stapleton requested the Commission hold hearing dates for termination hearing July 16, 17, and 18, 2024, a termination hearing May 6, 7, and 8, 2024, and confirmed an upcoming hearing for a letter of reprimand on April 23 and 24, 2024. Mr. Stapleton asked the Commission to hold June 10, 11, and 12, 2024 for future scheduling.

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

- a. Engineer I-IV

Principal Human Resources Analyst Michael Hobbs presented the proposed revisions to the Engineer series specification along with Public Works Department Head, John Diodati, and Human Resources Analyst Miranda Wall. Before starting Mr. Hobbs requested corrections for the Engineer I/II/III job specification. These corrections included the minimum qualifications

Civil Service Commission

90 section. Mr. Hobbs explained what these corrections were and provided reasons as to why
91 the changes were necessary.

92
93 Mr. Hobbs provided clean copies of the proposed specification including these revisions to the
94 Commission for consideration. President Nicholson requested the Commission review and
95 consider the newly distributed documents.

96
97 Mr. Hobbs explained the revisions for Engineer I/II/III/IV job specifications were primarily to
98 revise the minimum qualifications related to the Professional Engineer or Land Surveyor
99 registration but also needed updates to clearly distinguish the characteristics of the duties of
100 each class. Engineer IV is a true Supervisor specification and is also in the Supervising
101 Bargaining unit and is not part of the career series. Moving it to its own document and retitling
102 the specification will help clarify that and minimize confusion with incumbents or applicants.
103 The Commission requested the following amendments to the proposed Engineer I-II-III
104 specification: page 2 line 38 to change from "Checks maps and plans," to, "Checks maps and
105 plans submitted by third parties," and page 2 line 44 to change "Reviews plans and construction
106 for compliance with standards and specifications," to, "Reviews plans and construction
107 documents prepared by the County for compliance with standards and specifications."

108
109 Commission President Nicholson invited public comment. SLOCEA Executive Director Emily
110 Landis commented that SLOCEA was in support of the specification changes.

111
112 Commissioner Bergman motioned to approve the revised specification as amended.
113 Commission Warren seconded the motion. The motion to approve the revised specification as
114 amended passed 5-0-0.

115
116 The Commission moved on to the review of Supervising Engineer. Mr. Hobbs reported most of
117 the revisions were to more clearly distinguish the supervisory responsibilities and discussed
118 the other proposed changes.

119
120 Commissioner Santos proposed amendment to page 6a.027 line 31 to change "Prepares
121 reports and recommendations outlining cost and benefits of alternative project proposals," to,
122 "Prepares or oversees preparation of reports and recommendations outlining costs and
123 benefits of alternative project proposals," The Commission requested amendment to page
124 6a.027 line 27 to change "Checks maps and plans," to, "Checks maps and plans submitted by
125 third parties."

126
127
128 President Nicholson requested amendment to page 6a.027 line 34 to change "Reviews plans
129 and construction for compliance with standards and specifications," to, "Reviews plans and
130 construction documents prepared by the County for compliance with standards and
131 specifications."

Civil Service Commission

134 Vice President Baltodano requested amendment to page 6a.027 lines 34-35 to change "Acts as
135 engineering representative for the Department before official boards, commissions, and the
136 general public," to, "May represent the Department before official boards, commissions, and
137 the general public."
138

139 Vice President Baltodano requested amendment to page 2 line 46 to change "Acts as
140 engineering representative for the Department before official boards, commissions, and the
141 general public," to, "May represent the Department before official boards, commissions, and
142 the general public."
143

144 President Nicholson invited public comment on the proposed amendment to the Supervising
145 Engineer specification. There was none.
146

147 Vice President Baltodano motioned to approve the specification as amended. Commissioner
148 Santos seconded the motion. The motion to approve the revised specification as amended
149 passed 5-0-0.
150

151 Following review and approval of the Supervising Engineer specification, Commissioner
152 Bergman motioned to reconsider the Engineering I-II-III specification. Commissioner Warren
153 seconded the motion to reconsider. The motion to reconsider the Engineer I-II-III specification
154 passed 5-0-0.
155

156
157 President Nicholson invited public comment. There was none.
158

159 The Commissioner's proposed their amendments. Commissioner Santos motioned to approve
160 the revised Engineer I/II/III specification as further amended. Commissioner Warren seconded
161 the motion. The motion to approve the specification as amended passed 5-0-0.
162
163

164 **7. Public Comment on Closed Session Item**

165
166 Members of the public wishing to address the Civil Service Commission on Closed Session
167 matters agendized here may do so when recognized by the President. Presentations are limited
168 to three minutes per individual. Hearing no public comment, President Nicholson moved to
169 Closed Session.
170

171 **8. CLOSED SESSION: Conference with County Labor Negotiator regarding Civil Service Rule** 172 **Update. (Gov Code Section 54957.6):** Agency designated representative: Tami Douglas- 173 Schatz, or designee 174

175 President Nicholson stated that there was no reportable action in Closed Session.
176
177
178

Civil Service Commission

179
180
181
182
183
184
185
186
187
188
189
190
191

9. Closed Session –Public Employee Discipline (per Government Code Section 54957(b)):

Hearing and deliberations regarding Appeal # A22-04

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

10. Adjournment

President Nicholson adjourned the meeting at 10:52am.

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

DRAFT

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica 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, March 27, 2024 @ 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
Commission Clerk Shaley Salsbury
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 9:00 am 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.

Commissioner Bergman reminded the Human Resources staff that mail addressed to an individual commissioner is not to be opened by staff.

3. Reports

Commission President - None

Commission Counsel - None

Commission Outside Counsel - None

Civil Service Commission

47 **Commission Secretary** – Tami Douglas-Schatz reported her resignation from the County of
48 San Luis Obispo effective April 12, 2024, after serving as Human Resources Director for the last
49 15 years. Commission President Nicholson on behalf of the Commission, Commissioner
50 Bergman, Commission Vice President Baltodano, Commissioner Warren, Commissioner
51 Santos, Principal Human Resources Analyst Mark McKibben, and SLOCEA Senior Labor
52 Representative Theresa Schultz expressed their appreciation for Ms. Douglas-Schatz's
53 professionalism and dedication to continuous improvement.
54

4. Public Comment on Closed Session Items

55
56
57 Members of the public wishing to address the Civil Service Commission on Closed Session
58 matters agendaized here may do so when recognized by the President. Presentations are limited
59 to three minutes per individual. Hearing no public comment, President Nicholson moved to
60 Closed Session.
61

5. 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

62
63
64
65
66 President Nicholson stated that there was no reportable action in Closed Session.
67

6. Closed Session –Public Employee Discipline (per Government Code Section 54957(b)): Hearing and deliberations regarding Appeal # A22-04

68
69
70
71 President Nicholson stated that there was no reportable action in Closed Session.
72

7. Adjournment

73
74
75 President Nicholson adjourned the meeting at 11:20 a.m.
76

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

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica Baltodano *Commission Vice President, District 3*
David Warren *District 4*
Robert Bergman *District 5*

Jamie Russell *Commission Secretary*

Minutes

County of San Luis Obispo Civil Service Commission Special Session Meeting

Tuesday April 23, 2024 @ 9:00 a.m.

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

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

Staff: Commission Secretary Mark McKibben
Commission Clerk Shaley Salsbury

Outside Counsel: Steve Simas

Absent: Commissioners: Commissioner Bergman

County Counsel: Jon Ansolabehere

1. Call to Order / Flag Salute / Roll Call

Commission President Nicholson called the meeting to order at 9:00 a.m. and led the flag salute. Roll was called. Commissioner Bergman was absent.

2. Public Comment on Closed Session Item

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

SLOCEA Senior Labor Representative Thersa Schultz introduced SLOCEA Labor Representative Brooke Daphne to the Commission. Following public comment, President Nicholson moved to Closed Session.

3. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Deliberations regarding Appeal #A22-04

Civil Service Commission

46
47
48
49
50
51
52
53
54
55
56
57
58
59
60

President Nicholson stated that deliberations would not occur until all Commissioners present for the hearing regarding appeal #A22-04 were present for deliberation.

4. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):
Hearing and deliberations regarding Appeal #A23-03

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

5. Adjournment

President Nicholson adjourned the meeting at 4:45p.m.

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

DRAFT

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica Baltodano *Commission Vice President, District 3*
David Warren *District 4*
Robert Bergman *District 5*

Jamie Russell *Commission Secretary*

Minutes

County of San Luis Obispo Civil Service Commission Regular Session Meeting

Wednesday, April 24, 2024 @ 9:00 a.m.

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

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

Staff: Commission Secretary Mark McKibben
Commission Clerk Shaley Salsbury

Outside Counsel: Steve Simas

Absent: Commissioners: Commissioner Bergman

County Counsel: Jon Ansolabehere

1. Call to Order / Flag Salute / Roll Call

Commission President Nicholson called the meeting to order at 9:00 am and led the flag salute. Roll was called. Commissioner Bergman 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 President. Presentations are limited to three minutes per individual. There was no public comment.

3. Reports

Commission President - None

Commission Counsel - Absent

Commission Outside Counsel - none

Commission Secretary - Principal Human Resources Analyst Mark McKibben acknowledged Administrative Professionals Day, and introduced Frank Stapleton, Principal Human Resources

Civil Service Commission

47 Analyst. Mr. Stapleton asked the Commission for alternate dates for Probation termination
48 hearing tentatively scheduled for July 16-18, 2024. The Commission was asked to hold August
49 27-29, 2024, rather than the July dates. Mr. Stapleton asked the Commission to discontinue
50 holding June 10-12, 2024, as no hearing was scheduled.

51
52

4. Public Comment on Closed Session Items

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

58

5. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

60 Deliberations regarding Appeal #A22-04

61

62 President Nicholson stated that deliberations would not occur until all Commissioners
63 present for the hearing regarding appeal #A22-04 were present for deliberation.

64

6. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

66 Hearing and deliberations regarding Appeal #A23-03

67

68 President Nicholson stated direction was given to counsel on preparing an opinion after
69 deliberations regarding Appeal #A23-03.

70

7. Adjournment

72

73 President Nicholson adjourned the meeting at 10:15a.m.

74

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

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica Baltodano *Commission Vice President, District 3*
David Warren *District 4*
Robert Bergman *District 5*

Jamie Russell *Commission Secretary*

Minutes

County of San Luis Obispo Civil Service Commission Special Session Meeting

Monday May 6, 2024 @ 9:00 a.m.

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

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

Staff: Commission Secretary Mark McKibben
Commission Clerk Shaley Salsbury

Outside Counsel: Steve Simas

Absent: Commissioners: Commissioner Bergman

County Counsel: Jon Ansolabehere

1. Call to Order / Flag Salute / Roll Call

Commission President Nicholson called the meeting to order at 9:00 a.m. and led the flag salute. Roll was called. Commissioner Bergman was absent. Commissioner Santos was present for the morning session and absent for the afternoon session.

2. Public Comment on Closed Session Item

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

3. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Deliberations regarding Appeal #A23-03

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

Civil Service Commission

47
48
49
50
51
52
53
54
55
56
57
58
59
60
61
62
63

4. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Deliberations regarding Appeal #A22-04

President Nicholson stated that deliberations would not occur until all Commissioners present for the hearing regarding appeal #A22-04 were present for deliberation.

5. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Hearing and deliberations regarding Appeal #A23-04

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

6. Adjournment

President Nicholson adjourned the meeting.

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

DRAFT

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica Baltodano *Commission Vice President, District 3*
David Warren *District 4*
Robert Bergman *District 5*

Jamie Russell *Commission Secretary*

Minutes

County of San Luis Obispo Civil Service Commission Special Session Meeting

Tuesday May 7, 2024 @ 9:00 a.m.

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

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

Staff: Commission Secretary Mark McKibben
Commission Clerk Shaley Salsbury

Outside Counsel: Steve Simas

Absent: Commissioners: Commissioner Bergman, Commissioner Santos

County Counsel: Jon Ansolabehere

1. Call to Order / Flag Salute / Roll Call

Commission President Nicholson called the meeting to order at 9:00 a.m. and led the flag salute. Roll was called. Commissioners Bergman and Santos were absent.

2. Public Comment on Closed Session Item

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

3. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Deliberations regarding Appeal #A23-03

President Nicholson stated that deliberations would not occur until all Commissioners present for the hearing regarding appeal #A23-03 were present for deliberation.

Civil Service Commission

47
48
49
50
51
52
53
54
55
56
57
58
59
60
61
62
63
64

4. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Deliberations regarding Appeal #A22-04

President Nicholson stated that deliberations would not occur until all Commissioners present for the hearing regarding appeal #A22-04 were present for deliberation.

5. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Hearing and deliberations regarding Appeal #A23-04

President Nicholson reported that direction was given to counsel.

6. Adjournment

President Nicholson adjourned the meeting.

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

DRAFT

Civil Service Commission



Jed Nicholson *Commission President, District 1*
Lesley Santos *District 2*
Erica Baltodano *Commission Vice President, District 3*
David Warren *District 4*
Robert Bergman *District 5*

Jamie Russell *Commission Secretary*

Minutes

County of San Luis Obispo Civil Service Commission Regular Session Meeting

Wednesday, May 22, 2024 @ 9:00 a.m.

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

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

Staff: Commission Secretary Taj D'Entremont
Acting Commission Clerk Rosa Reyes

Outside Counsel: Steve Simas and Frances Heredia

Absent: Commissioners: None

County Counsel: Jon Ansolabehere

1. Call to Order / Flag Salute / Roll Call

Commission President Nicholson called the meeting to order at 9:00 am 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.

Theresa Schultz, Senior Labor Representative with SLOCEA brought to the Commissioner's attention the County BLADE featured stories highlighting Vice President Baltodano, President Nicholson, and Commission Bergman.

Civil Service Commission

47
48
49
50
51
52
53
54
55
56
57
58
59
60
61
62
63
64
65
66
67
68
69
70
71
72
73
74
75
76
77
78
79
80
81
82
83
84
85
86
87
88
89
90

3. Reports

Commission President – Welcomed back Commissioners that had been absent for family matters. President Nicholson wanted to discuss the June Regular meeting. He stated he will not be present. Commission Secretary Taj D’Entremont reported no items for the June regular meeting. All commissioners were in favor of cancelling the June Regular Meeting.

Commission Counsel – None

Commission Outside Counsel – None

Commission Secretary – Principal Human Resources Analyst Taj D’Entremont reported Jamie Russell, Human Resources, Director wanted to convey to the Commission that she was not present for the meeting because she was moving her son to Arizona and looks forward to meeting with the Commission in July.

Principal Human Resources Analyst, Frank Stapleton, wanted to confirm August dates for a termination hearing moved from July. The dates requested were August 27th, 28th and 29th. Other dates requested to reserve were October 22nd, 23rd and 24th for an Appeal for a termination. These dates were confirmed.

4. Public Comment on Closed Session Items

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

5. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):

Deliberations regarding Appeal #A22-04

President Nicholson reported after Closed Session deliberations of Appeal #A22-04, a decision had been made. Page 27 of the Findings and Decisions, based on the findings of fact, the conclusions of law, and weighing all the evidence and circumstances in this matter, the Commission concludes that the appropriate discipline is termination and the Respondent’s final order of termination is sustained.

Commissioner Bergman made a motion to approve the decision in the Findings and Decision on page 27. Vice President Baltodano seconded the motion. Motion carried 5-0-0.

After roll call, President Nicholson moved to Closed Session regarding Appeal #A23-03.

Civil Service Commission

91 **6. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):**
92 Hearing and deliberations regarding Appeal #A23-03
93

94 President Nicholson reported the Commission deliberated #A23-03 and the decision is, based on
95 the findings and fact, the conclusions of law, and weighing all the evidence and circumstances
96 in this matter, the Commission concludes that the Respondent’s letter of reprimand is
97 appropriate and upheld for the reasons set forth above. Vice President Baltodano made a
98 motion to approve and seconded by Commissioner Warren. Motion carried 4-0-1 with
99 Commissioner Bergman abstaining.

100
101 After roll call, President Nicholson moved to Closed Session regarding Appeal #A23-04.
102

103 **7. Closed Session – Public Employee Discipline (per Government Code Section 54957(b)):**
104 Hearing and deliberations regarding Appeal #A23-04
105

106 President Nicholson reported the Commission deliberated over #A23-04. The decision is, based
107 on the findings and fact, the conclusions of law, and weighing all the evidence and
108 circumstances in this matter, the commission concludes the department’s order of
109 termination is appropriate for the reasons set forth above. Commission Warren made a
110 motion to approve, and Vice President Baltodano seconded the motion. Motion carried 3-0-2,
111 with Commissioner Bergman and Commissioner Santos abstaining.
112

113 **8. Adjournment**
114

115 President Nicholson adjourned the meeting with nothing else to report out of Closed Session.
116

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



SAN LUIS OBISPO COUNTY CIVIL SERVICE COMMISSION ANNUAL REPORT

2023 ANNUAL REPORT



INTRODUCTION

AUTHORITY AND PURPOSE

The County Civil Service Commission shall prescribe, amend, repeal and enforce rules for the classified service, which shall have the force and effect of law, shall keep minutes of its proceedings and records of its examinations and shall, as a board or through a single Commissioner, make investigations concerning the enforcement and effect thereof and of the rules and efficiency of the service. It shall make an annual report to the Board of Supervisors.

Additionally, the Human Resources Director, under general supervision of the Commission, shall administer the civil service system pursuant to the rules adopted by the Commission and advise the Commission upon civil service matters.

HUMAN RESOURCES MISSION STATEMENT

We attract, select, develop, and retain a talented and diverse workforce through strategic collaboration. We provide high quality and cost-effective programs to cultivate a healthy, safe and productive work environment to maximize individual and organizational potential.

COUNTY CODE: TITLE 2 – ADMINISTRATION AND PERSONNEL

There is established in the County a civil service system to be governed by the provisions set forth in this chapter and in the County Civil Service enabling law. Click through the chapter sections below to view the County Code.

Chapter 2.40 - CIVIL SERVICE SYSTEM

2.40.010 - Adoption.

2.40.020 - Commission—Creation—Membership.

2.40.030 - Compensation for commission members.

2.40.040 - Operating funds.

2.40.050 - Contracting for examinations.

2.40.060 - Classified and unclassified service.

2.40.070 - Duties of commission and personnel director.

2.40.080 - Commission rules.

2.40.090 - Vacancies in peculiar positions.

2.40.100 - Examination requirements.

2.40.110 - Discrimination prohibited.

2.40.120 - Reductions, suspensions and dismissals.

2.40.130 - Employee status.

2.40.140 - Prerequisites to salary payment.

2.40.150 - Veteran's preference.

GRIEVANCES, APPEALS AND LITIGATION

The Commission's rules outline the procedure for resolving employment disputes prior to requesting a hearing.

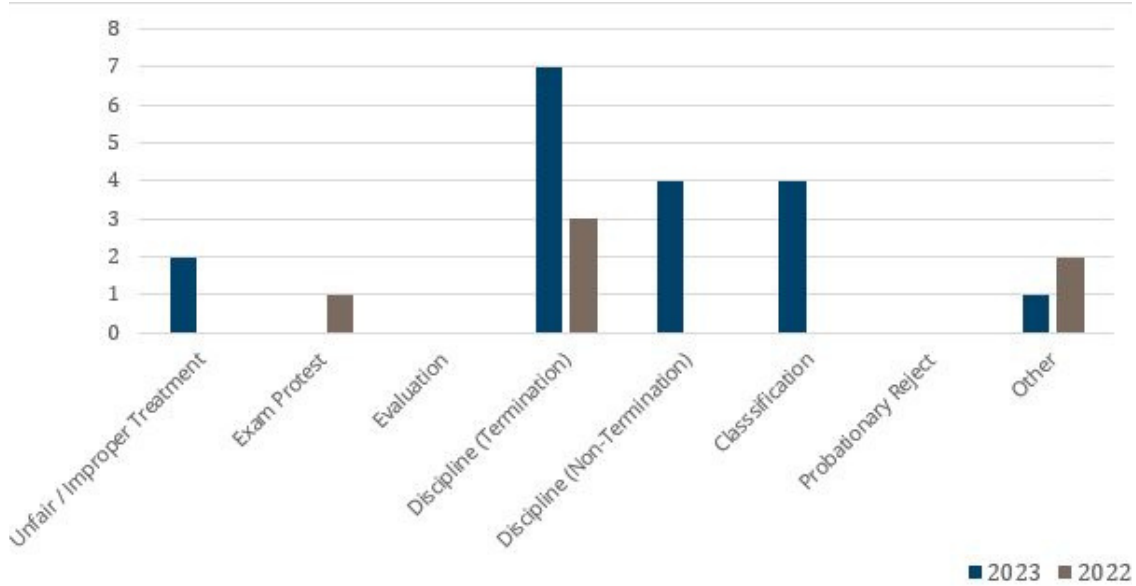
GRIEVANCES AND APPEALS FILED BY DEPARTMENT

DEPARTMENT	2023	2022	2021	2020
ADMINISTRATIVE OFFICE				
AIRPORTS	1			
AGRICULTURAL COMMISSIONER				
ASSESSOR				
AUDITOR-CONTROLLER/TREAS TAX			2	
CENTRAL SERVICES			1	
CHILD SUPPORT SERVICES				1
CLERK-RECORDER				
COUNTY COUNSEL				3
DISTRICT ATTORNEY	2			
HEALTH AGENCY	4	2	2	2
HUMAN RESOURCES				
INFORMATION TECHNOLOGY				
LIBRARY	1	1		
PARKS AND RECREATION			1	
PLANNING AND BUILDING	1	1		1
PROBATION	1			
PUBLIC WORKS	3		2	2
SHERIFF-CORONER	5	2	3	1
SOCIAL SERVICES				1
VETERANS SERVICES				
TOTAL	18	6	11	11



GRIEVANCES, APPEALS AND LITIGATION

GRIEVANCES AND APPEALS FILED BY TYPE



GRIEVANCES AND APPEALS FILED BY CALENDAR YEAR

	2023	2022
Filed	18	6
Resolved prior to Commission hearing (Resolved, Withdrawn, Dismissed)	17	5
Heard before the Commission	1	1
Pending Appeals and Grievances	2	5

PENDING LITIGATION

As of the end of Calendar Year 2023, there are four litigation matters pending.

COMMISSION MEETINGS

SCHEDULED MEETINGS

The Civil Service Commission held a total of fourteen (14) meetings during Calendar Year 2023. Eleven (11) of those meetings were Regular Session and three (3) were Special Session. All fourteen (14) meetings held included closed sessions. Only one (1) meeting was cancelled. The closed sessions were to discuss/deliberate rule updates or hear grievance/appeal matters.

- January 25, 2023, Regular Session*
- February 22, 2023, Regular Session **Cancelled**
- March 22, 2023, Regular Session*
- April 6, 2023, Special Session*
- April 26, 2023, Regular Session*
- May 24, 2023, Regular Session*
- June 28, 2023, Regular Session*
- July 26, 2023, Regular Session*
- August 23, 2023, Regular Session*
- September 27, 2023, Regular Session*
- October 25, 2023, Regular Session*
- November 29, 2023, Regular Session*
- December 11, 2023, Special Session*
- December 12, 2023, Special Session*
- December 13, 2023, Regular Session*

**Indicates meetings with closed session*

COMMISSION HIGHLIGHTS

- Commission Counsel Steve Simas presented “Introduction to Appeals, Process, and Hearings” to the Commission and Human Resources staff.
- The Commission heard a presentation from Human Resources on recruitment and retention.
- The Commission approved widespread changes to the minimum qualification language for job specs for increased flexibility.
- Commissioner Dave Warren was appointed as Commissioner for District Four.
- Commissioner Robert Bergman was recognized for thirty years of continuous service on the Civil Service Commission.
- The Commission issued a finding and result in one appeal.



CLASS SPECIFICATION ACTIVITY

CLASS SPECIFICATIONS

Classification specifications are the foundation of the County's job classification and compensation systems. There were 368.50 (three hundred and sixty eight and a half) FTE existing positions impacted by classification revisions in CY 2023.

REVISED SPECIFICATIONS

- GROUNDS RESTORATION SPECIALIST
- SHERIFF'S DISPATCH MANAGER
- JUVENILE SERVICES OFFICER I/II/III
- DEPUTY PROBATION OFFICER I/II
- DEPUTY PROBATION OFFICER III
- SUPERVISING DEPUTY PROBATION OFFICER
- PROBATION ASSISTANT
- SHERIFF'S CORRECTIONAL DEPUTY
- SHERIFF'S SR. CORRECTIONAL DEPUTY
- SHERIFF'S CORRECTIONAL SERGEANT
- CHIEF DEPUTY PROBATION OFFICER
- M.H. MEDICAL RECORDS SUPERVISOR
- LEGAL CLERK I/II/III
- LEGAL CLERK - CONFIDENTIAL I/II/III
- SUPERVISING LEGAL CLERK
- ASSESSMENT TECHNICIAN I/II/III/IV

NEW SPECIFICATIONS

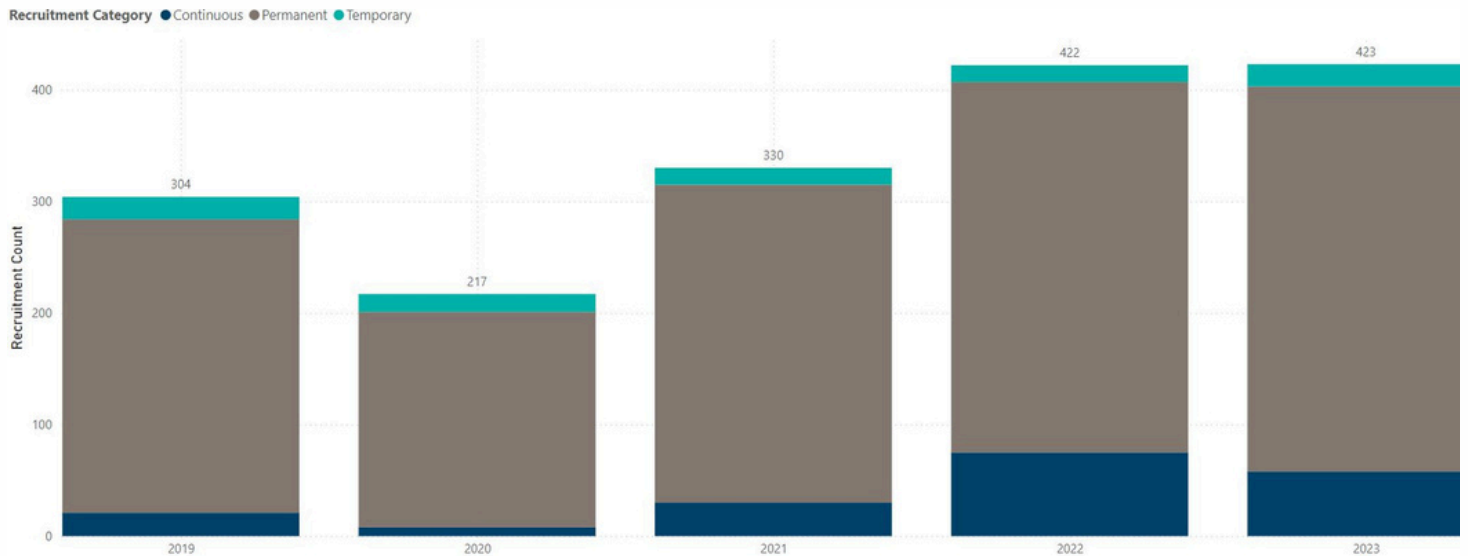
- PAYROLL TECHNICIAN - CONFIDENTIAL
- DEPUTY DIRECTOR - BEHAVIORAL HEALTH
- ASSISTANT CHIEF DEPUTY PROBATION OFFICER
- ENTERPRISE ARCHITECT



RECRUITMENT ACTIVITY

The Rules of the Commission that govern the County's recruitment process are consistent with the County's obligation to ensure all examinations for employment are fair, impartial, and aligned with the merit system principles.

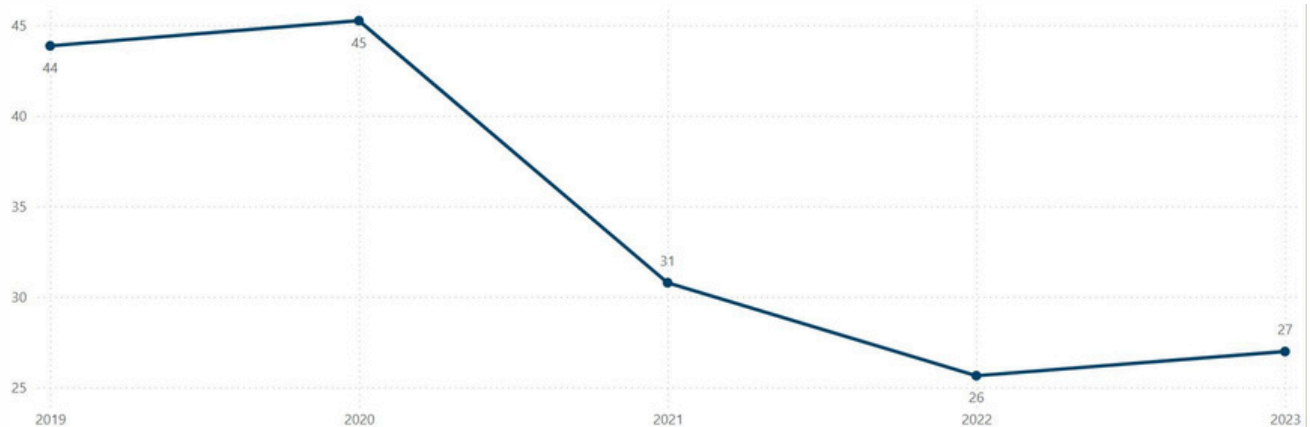
Recruitments Year over Year by Type



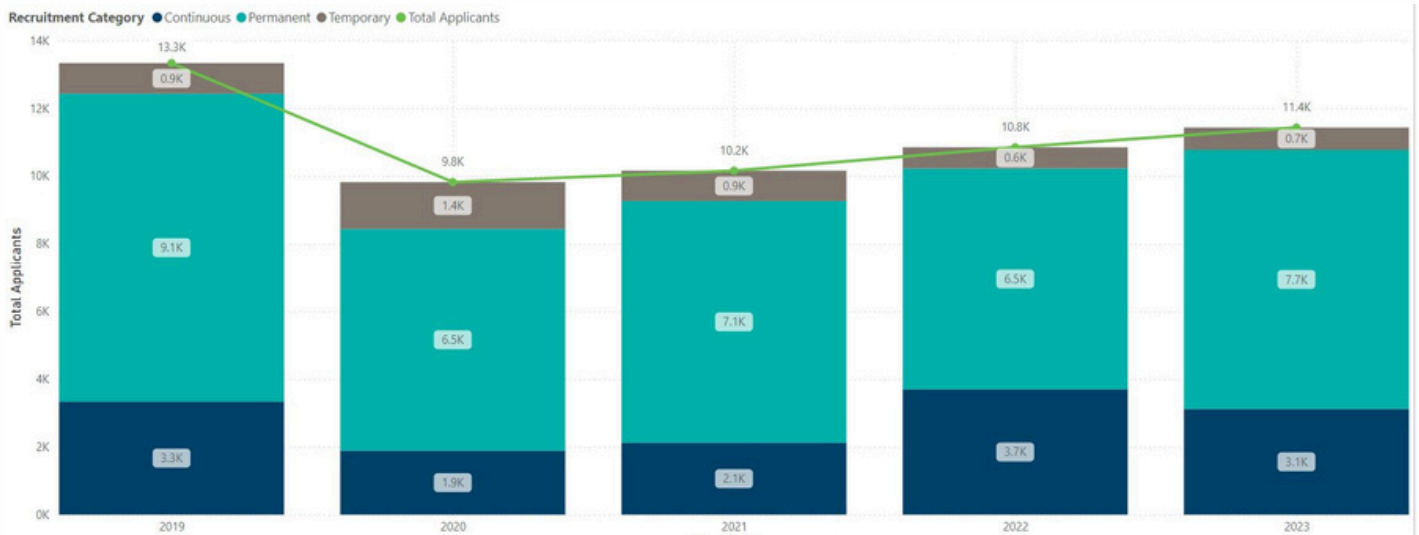
Recruitments, or job postings, are classified into three main categories for reporting: permanent, temporary, and continuous. Year over year the County has seen an increase in promotional recruitments. The total number of recruitments was nearly identical between 2022 and 2023.

RECRUITMENT ACTIVITY

Average Applicants per Recruitment



Average Applicants by Recruitment Type

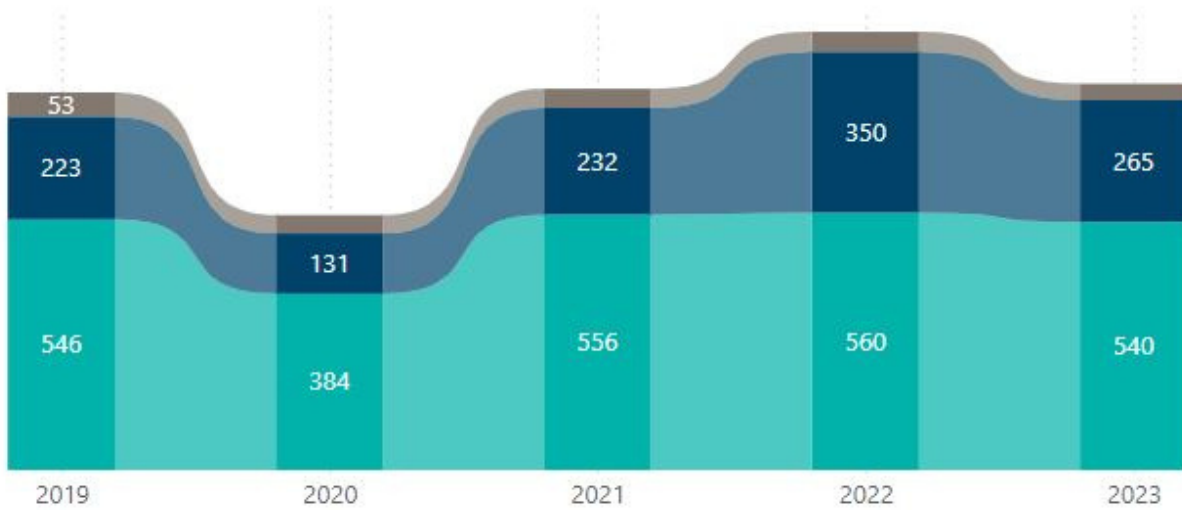


As seen in the first graph, the average number of applicants per recruitment was at a record high in 2019, with a decrease during the pandemic. As displayed in the second graph, the number of total applicants has steadily increased from 2020, with roughly a 16% increase in the past three years. There was a 5% increase in applicants from 2022 to 2023.

RECRUITMENT ACTIVITY CONTINUED

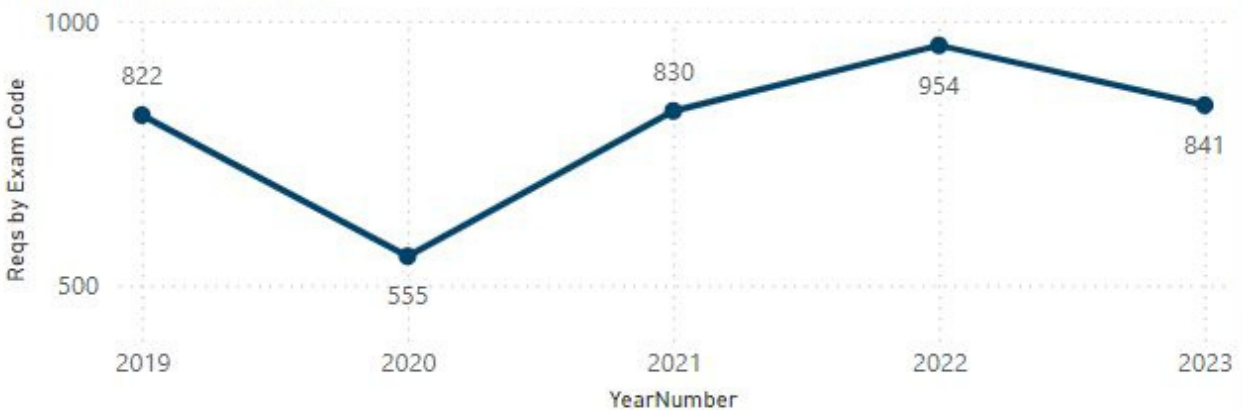
Requisitions Year over Year by Type

Recruitment Type ● Continuous ● Permanent ● Temporary



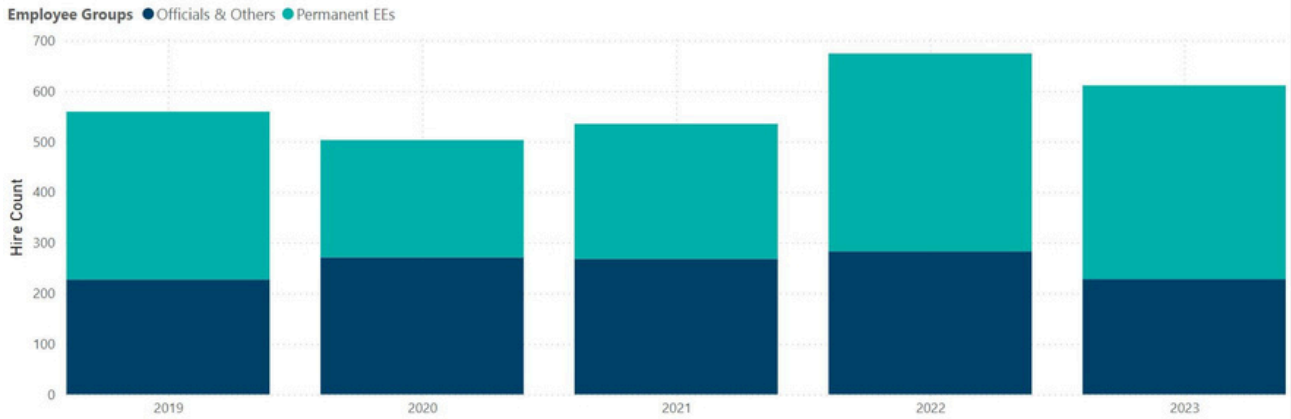
Requisitions, or requests to fill positions, are classified into three main categories for reporting: permanent, temporary, and continuous. In the past three years, there has been an increase, with 2022 as the highest year of recruiting ever, due to increased turnover. The County's State of the Workforce presentation highlighted the factors driving the post-pandemic increase in recruiting.

Requisitions Opened



RECRUITMENT ACTIVITY CONTINUED

New Hires by Calendar Year



The County saw a slight decrease in new hires for calendar year 2023 with a total of 611 new hires. In 2022, the County had 674 new hires.

Notable Changes Over Prior Year

Total Recruitments	+0.23%
Open Recruitments	+3.84%
Total Hires	-9.0%

Notable Changes Over Five Years

Total Recruitments	+32.0%
Open Recruitments	+26.9%
Total Hires	+9.0%

EQUAL EMPLOYMENT OPPORTUNITY

While not a legal mandate, the County collects data on race and gender to identify groups which may be underrepresented in County employment as part of the Equal Employment Opportunity plan.

RACE

		WHITE	HISPANIC	BLACK	NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER	AMER INDIAN OR ALASKAN NATIVE	ASIAN	TWO OR MORE RACES	OTHER/ BLANK	TOTAL
County Workforce	FY21-22	66.30%	22.90%	1.82%	0.13%	0.64%	3.70%	4.30%	0.00%	3,131
	2023	63.44%	25.89%	4.09%	0.07%	0.64%	1.42%	4.46%	0.00%	3,150
New Hires	FY21-22	62.26%	25.71%	1.95%	0.15%	0.60%	4.81%	3.61%	0.90%	674
	2023	59.74%	29.79%	1.31%	0.38%	0.76%	4.48%	3.44%	0.00%	611
Applications	FY21-22	53.69%	32.12%	4.46%	0.00%	1.22%	6.32%	0.00%	2.26%	10,847
	2023	52.99%	31.32%	4.48%	0.00%	0.98%	7.99%	0.00%	2.48%	11,429
US Census Bureau (County of SLO 2020)		88.80%	22.90%	2.00%	0.20%	1.40%	4.00%	3.6%	N/A	283,111

GENDER

		FEMALE	MALE	NON-BINARY	UNKNOWN	TOTAL
County Workforce	FY21-22	57.7%	42.3%	0.00%	0.00%	3,131
	2023	56.01%	43.89%	0.10%	0.00%	3,150
New Hires	FY21-22	58.65%	41.05%	0.30%	0.00%	674
	2023	55.16%	44.52%	0.33%	0.00%	611
Applications	FY21-22	54.65%	43.74%	0.46%	1.16%	10,847
	2023	54.83%	43.51%	0.40%	1.26%	11,429
US Census Bureau (County of SLO 2020)		49.40%	50.60%	No Data	0.00%	283,111

EQUAL EMPLOYMENT OPPORTUNITY

Data continued.

AGE

		UNDER 30	30-39	40-49	50-59	60 AND OVER	UNKNOWN	TOTAL
County Workforce	FY21-22	14.5%	26.3%	24.4%	24.70%	10.10%	0.00%	3,131
	2023	12.69%	28.94%	27.97%	20.67%	9.73%	0.00%	3,150
New Hires	FY21-22	39.40%	23.01%	15.94%	12.78%	8.87%	0.00%	674
	2023	39.61%	27.66%	16.53%	8.35%	7.86%	0.00%	611
Applications	FY21-22	32.90%	27.35%	19.32%	12.60%	5.45%	2.38%	10,847
	2023	32.96%	28.31%	20.18%	11.86%	2.48%	2.20%	11,429
US Census Bureau (County of SLO 2020)		39.90%	10.70%	12.70%	15.10%	21.50%	0.00%	283,111

CIVIL SERVICE COMMISSION CONTACT INFORMATION

STAFF TO THE CIVIL SERVICE COMMISSION

Jamie Russell, Human Resources Director, Commission Secretary
Jon Ansolabehere, Assistant County Counsel, Commission Counsel
Steve Simas, Outside Counsel
Shaley Salsbury, Commission Clerk



John E.D. Nicholson, President
District One



Lesley Santos, Commissioner
District Two



Erica Flores Baltodano, Vice President
District Three



David Warren, Commissioner
District Four



Robert Bergman, Commissioner
District Five



COUNTY OF SAN LUIS OBISPO
DEPARTMENT OF HUMAN RESOURCES

Jamie Russell *Director*

TO: Civil Service Commission

DATE: July 24, 2024

FROM: Michael Hobbs, Principal Human Resources Analyst

SUBJECT: Approval for Human Resources to 1) add the education and experience requirement preamble language approved at the January 25, 2023, Civil Service Commission meeting, 2) to identify and remove or revise language describing allowed formulaic substitutions where appropriate, and 3) to identify and move any required licenses, certifications, or memberships from the Education and Experience section to the Licenses and Certificates section of the job specifications where appropriate.

RECOMMENDATION

It is recommended that the Civil Service Commission grant approval to Human Resources to 1) add the education and experience requirement preamble language approved at the January 25, 2023, Civil Service Commission meeting, 2) to identify and remove or revise language describing allowed formulaic substitutions where appropriate, and 3) to identify and move any required licenses, certifications, or memberships from the Education and Experience section to the Licenses and Certificates section of the job specifications where appropriate.

BACKGROUND

On January 25, 2023, Human Resources gave a presentation to the Civil Service Commission on an overview of recruitment, selection, learning and development and the impacts of the minimum qualification pattern. During that presentation it was discussed how the current minimum qualification language in place for the majority of the County's classification specifications reduces the County's pool of qualified applicants by presenting unnecessary barriers to entry and promotion, how there is a need for a change in the application of minimum qualifications in order to attract candidates who may have attained the necessary knowledge and skills through varied routes, and how the County's traditional method of determining how an applicant may meet minimum qualifications tends to disproportionately exclude women and minorities, among other examples.

On April 23, 2023, the Commission approved Human Resources' recommendation to add a more flexible preamble language as well as the removal of formulaic or substitutionary language to approximately

County of San Luis Obispo Government Center

1055 Monterey Street Suite D250 | San Luis Obispo, CA 93408 | (P) 805-781-5959 | (F) (805) 781-1044
hr@co.slo.ca.us | slocounty.ca.gov

6a.001

seventy-one percent (71%) of the County job specifications. The approved preamble language is as follows:

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

DISCUSSION

Following the April 23, 2023, meeting, Human Resources did an in-depth review of the remaining twenty-nine percent (29%) of County job specifications that had not yet been evaluated for the addition of the preamble language. Human Resources has completed the review of the remaining classifications and recommends the following changes:

1. Eighty-four (84) County job specifications will have the same revisions that were approved during the April 23, 2023, Civil Service Commission meeting, whereby the new preamble language will be added to the Education and Experience section of the job specifications, and any formulaic or substitutionary language will be removed. These classifications are listed in Attachment A.

For example, the **Health Information Tech I/II/III** specification will be revised as follows:

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:

Health Information Technician I: Either A: Possession of a valid Registered Health Information Technician (RHIT) or Registered Health Information Administrator (RHIA) certificate from the American Health Information Management Association (AHIMA) or equivalent. Or B: Two years of closely related medical records experience. ~~Completion of one year of coursework in medical terminology may substitute for up to one year of the required experience.~~

Health Information Technician II: Three years of experience as a Health Information Technician I or equivalent. ~~A valid RHIT or RHIA certificate or equivalent may substitute for one year of the required experience.~~

Health Information Technician III: Three years of experience as a Health Information Technician II or equivalent. ~~A valid RHIT or RHIA certificate or equivalent may substitute for one year of the required experience.~~

2. Fifty-two (52) County job specifications will have the same preamble language added and formulaic substitutionary language deleted as described above, and any required licenses, certifications, or memberships will remain as requirements but will be moved from the Education

and Experience section to the Licenses and Certifications section of the job specifications. These classifications are listed in Attachment B.

For example, the **Deputy District Attorney I/II/III/IV** specification will be revised as follows:

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:

All levels must have membership in the California State Bar which must be maintained throughout employment, AND:

Deputy District Attorney I: No experience needed.

Deputy District Attorney II: One year of professional legal experience as an attorney in the practice of law.

Deputy District Attorney III: Two years of professional legal experience as an attorney in the practice of law.

Deputy District Attorney IV: Three years of professional legal experience as an attorney in the practice of law.

Licenses and Certificates

All levels must have membership in the California State Bar which must be maintained throughout employment.

Certain positions within this classification may require driving. When driving is an essential function of the position, a valid CALIFORNIA driver's license will be required at the time of appointment.

HR has determined that it is not appropriate to revise the minimum qualifications for the remaining approximately seventy-eight County job specifications that were either not previously approved by the Commission or identified in Attachments A or B above at this time. The minimum qualifications as currently written for these remaining job classifications are either essential for the successful performance of the job duties, or are required by State, Federal, or other regulations. Any future recommended changes to the minimum qualifications of these job specifications will be brought before the Commission for approval as necessary.

OTHER AGENCY INVOLVEMENT

All County departments reviewed these recommended changes to the job specifications in their departments. The classifications with the recommended revisions to the minimum qualifications shown in Attachments A and B are in unrepresented bargaining units and in bargaining units represented by the Deputy County Counsel Association (DCCA), Deputy Sheriffs' Association (DSA), San Luis Obispo County Employees' Association (SLOCEA), and San Luis Obispo County Prosecutors' Association (SLOPA). County departments and DCCA, DSA, and SLOCEA concur with these recommended changes. SLOPA did not respond to multiple requests for feedback on these recommended changes.

RESULTS

Approval of these recommendations will allow Human Resources to revise the minimum qualifications of the specifications listed in Attachments A and B, which will remove artificial barriers to hiring qualified candidates and for existing employees to promote to higher-level positions, thereby allowing the County to attract new candidates who may have attained the necessary skills and knowledge through alternative routes and to retain current employees by providing more opportunities for them advance in their careers.

ATTACHMENTS:

Attachment A – Classifications to add flexible preamble and eliminate required or substitutionary language

Attachment B – Classifications to add flexible preamble and move licenses or certifications to Licenses and Certifications section

Attachment A

Classifications to add flexible preamble and eliminate required or substitutionary language

Classification Title	BU	Minimum Qualification Language Change
AGR/WEIGHTS & MEASURES TECH II	BU01	Add flexible preamble and eliminate required or substitutionary language
AIRPORTS OPERATION SPECIALIST	BU01	Add flexible preamble and eliminate required or substitutionary language
ANIMAL CARE TECHNICIAN	BU02	Add flexible preamble and eliminate required or substitutionary language
ANIMAL CONTROL LEAD OFFICER	BU05	Add flexible preamble and eliminate required or substitutionary language
ANIMAL CONTROL OFFICER	BU01	Add flexible preamble and eliminate required or substitutionary language
ANIMAL CONTROL SUPERVISING OFFICER	BU05	Add flexible preamble and eliminate required or substitutionary language
ANIMAL SHELTER SUPERVISOR	BU05	Add flexible preamble and eliminate required or substitutionary language
ANIMAL SVCS HUMANE EDUCATOR	BU01	Add flexible preamble and eliminate required or substitutionary language
APPRAISER I	BU01	Add flexible preamble and eliminate required or substitutionary language
APPRAISER II	BU01	Add flexible preamble and eliminate required or substitutionary language
APPRAISER III	BU01	Add flexible preamble and eliminate required or substitutionary language
APPRAISER TRAINEE	BU01	Add flexible preamble and eliminate required or substitutionary language
ASSISTANT ASSESSOR	BU08	Add flexible preamble and eliminate required or substitutionary language
ASST AUDITOR-CONTROLLER	BU08	Add flexible preamble and eliminate required or substitutionary language
ASST REAL PROPERTY AGENT	BU01	Add flexible preamble and eliminate required or substitutionary language
AUTO MECHANIC II	BU02	Add flexible preamble and eliminate required or substitutionary language
B.H. WORKER I	BU01	Add flexible preamble and eliminate required or substitutionary language
B.H. WORKER II	BU01	Add flexible preamble and eliminate required or substitutionary language
B.H. WORKER III	BU01	Add flexible preamble and eliminate required or substitutionary language
BUILDING DIVISION SUPERVISOR	BU05	Add flexible preamble and eliminate required or substitutionary language
BUILDING MAINT SUPT	BU07	Add flexible preamble and eliminate required or substitutionary language
CAPITAL PROJECTS INSPECTOR	BU01	Add flexible preamble and eliminate required or substitutionary language
CHIEF DEPUTY-AGR COMMISSIONER	BU08	Add flexible preamble and eliminate required or substitutionary language
CHIEF DIST ATTY INVESTIGATOR	BU07	Add flexible preamble and eliminate required or substitutionary language
CHIEF WASTEWATER TRT PLANT OPER	BU05	Add flexible preamble and eliminate required or substitutionary language
CHIEF WATER TRT PLANT OPER-GR3	BU05	Add flexible preamble and eliminate required or substitutionary language
CHIEF WATER TRT PLANT OPER-GR4	BU05	Add flexible preamble and eliminate required or substitutionary language
COORDINATING LIBRARIAN	BU05	Add flexible preamble and eliminate required or substitutionary language
DEPUTY DIR-AUD CONT TREAS TAX PUB ADMIN	BU08	Add flexible preamble and eliminate required or substitutionary language
DIV MGR-BUILDING	BU08	Add flexible preamble and eliminate required or substitutionary language
DIV MGR-DRUG AND ALCOHOL SERVICES	BU07	Add flexible preamble and eliminate required or substitutionary language
DIV MGR-ENVIRONMENTAL HEALTH	BU07	Add flexible preamble and eliminate required or substitutionary language
DIV MGR-HEALTH AGENCY	BU07	Add flexible preamble and eliminate required or substitutionary language
DIV MGR-PLANNING	BU07	Add flexible preamble and eliminate required or substitutionary language
EMPLOYMENT/SERVICES SUPERVISOR	BU05	Add flexible preamble and eliminate required or substitutionary language
ENVIR HEALTH SPECIALIST I	BU01	Add flexible preamble and eliminate required or substitutionary language
ENVIR HEALTH SPECIALIST II	BU01	Add flexible preamble and eliminate required or substitutionary language
ENVIR HEALTH SPECIALIST III	BU01	Add flexible preamble and eliminate required or substitutionary language
GROUND RESTORATION SPECIALIST	BU02	Add flexible preamble and eliminate required or substitutionary language
HEALTH INFORMATION TECH I	BU13	Add flexible preamble and eliminate required or substitutionary language
HEALTH INFORMATION TECH II	BU13	Add flexible preamble and eliminate required or substitutionary language
HEALTH INFORMATION TECH III	BU13	Add flexible preamble and eliminate required or substitutionary language
LEAD FLEET MECHANIC	BU02	Add flexible preamble and eliminate required or substitutionary language
LOCKSMITH I	BU02	Add flexible preamble and eliminate required or substitutionary language
LOCKSMITH II	BU02	Add flexible preamble and eliminate required or substitutionary language
NETWORK HARDWARE SPECIALIST I	BU01	Add flexible preamble and eliminate required or substitutionary language
NETWORK HARDWARE SPECIALIST II	BU01	Add flexible preamble and eliminate required or substitutionary language
NUTRITION SERVICES PROGRAM MANAGER	BU07	Add flexible preamble and eliminate required or substitutionary language
ORAL HEALTH PROGRAM MANAGER	BU07	Add flexible preamble and eliminate required or substitutionary language
PERSONAL CARE AIDE	BU01	Add flexible preamble and eliminate required or substitutionary language
PHYS OR OCCUPATIONAL THER AIDE	BU01	Add flexible preamble and eliminate required or substitutionary language
PROPERTY TRANSFER TECH IV	BU01	Add flexible preamble and eliminate required or substitutionary language
PUBLIC HEALTH AIDE III	BU01	Add flexible preamble and eliminate required or substitutionary language
PUBLIC HEALTH LABORATORY MANAGER	BU07	Add flexible preamble and eliminate required or substitutionary language
PUBLIC HEALTH NUTRITIONIST I	BU01	Add flexible preamble and eliminate required or substitutionary language
PUBLIC HEALTH NUTRITIONIST II	BU01	Add flexible preamble and eliminate required or substitutionary language
PUBLIC WORKS WORKER IV	BU02	Add flexible preamble and eliminate required or substitutionary language

Attachment A

Classifications to add flexible preamble and eliminate required or substitutionary language

Classification Title	BU	Minimum Qualification Language Change
PURCHASSING MANAGER	BU07	Add flexible preamble and eliminate required or substitutionary language
SENIOR LIBRARY ASSOCIATE	BU05	Add flexible preamble and eliminate required or substitutionary language
SHERIFF'S DISPATCHER I	BU22	Add flexible preamble and eliminate required or substitutionary language
SHERIFF'S DISPATCHER II	BU22	Add flexible preamble and eliminate required or substitutionary language
SHERIFF'S DISPATCHER III	BU22	Add flexible preamble and eliminate required or substitutionary language
SOCIAL SVCS INVESTIGATOR	BU01	Add flexible preamble and eliminate required or substitutionary language
SOCIAL WORKER SUPERVISOR II	BU05	Add flexible preamble and eliminate required or substitutionary language
SOLID WASTE COORDINATOR I	BU01	Add flexible preamble and eliminate required or substitutionary language
SOLID WASTE COORDINATOR II	BU01	Add flexible preamble and eliminate required or substitutionary language
SOLID WASTE COORDINATOR III	BU01	Add flexible preamble and eliminate required or substitutionary language
SR INFORMATION TECHNOLOGY SPECIALIST	BU01	Add flexible preamble and eliminate required or substitutionary language
SR PLANNER	BU05	Add flexible preamble and eliminate required or substitutionary language
STOREKEEPER II	BU02	Add flexible preamble and eliminate required or substitutionary language
SUPERVISING CUSTODIAN	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPERVISING WASTEWATER SYS WORKER	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPERVISING WATER SYS WORKER	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPV CORRECTIONAL TECHNICIAN	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPV ENVIR HEALTH SPECIALIST	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPV PARK RANGER	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPV PHYS OR OCCUPATIONAL THER	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPV PROPERTY TRANSFER TECH	BU05	Add flexible preamble and eliminate required or substitutionary language
SUPV PUBLIC HEALTH MICROBIOL	BU05	Add flexible preamble and eliminate required or substitutionary language
SUSTAINABILITY MANAGER	BU07	Add flexible preamble and eliminate required or substitutionary language
VICTIM WITNESS SUPERVISOR	BU05	Add flexible preamble and eliminate required or substitutionary language
WATER QUALITY MGR	BU05	Add flexible preamble and eliminate required or substitutionary language
WATER SYSTEMS LAB TECH II	BU01	Add flexible preamble and eliminate required or substitutionary language
WATER SYSTEMS SUPERINTENDENT	BU05	Add flexible preamble and eliminate required or substitutionary language

Classifications to add flexible preamble and move licenses or certifications to Licenses and Certifications section

Classification Title	BU	Minimum Qualification Language Change
ANIMAL SVCS MANAGER (NON-VET)	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
ANIMAL SVCS MANAGER (VET)	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
ASST AG COMMISSIONER/WGHTS & MSRS SLR	BU08	Add flexible preamble and move license/certifications to Licenses and Certificates section
ASST COUNTY COUNSEL	BU08	Add flexible preamble and move BAR membership to Licenses and Certifications section
B.H. CLINICIAN I	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
B.H. CLINICIAN II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
B.H. CLINICIAN III	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
B.H. PROGRAM SUPERVISOR	BU05	Add flexible preamble and move license/certifications to Licenses and Certificates section
B.H. SPECIALIST I	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
B.H. SPECIALIST II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
B.H. SPECIALIST III	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
CHIEF DEPUTY COUNTY COUNSEL	BU07	Add flexible preamble and move BAR membership to Licenses and Certifications section
CHILD SUPPORT ATTORNEY I	BU07	Add flexible preamble and move BAR membership to Licenses and Certifications section
CHILD SUPPORT ATTORNEY II	BU07	Add flexible preamble and move BAR membership to Licenses and Certifications section
CHILD SUPPORT ATTORNEY III	BU07	Add flexible preamble and move BAR membership to Licenses and Certifications section
CHILD SUPPORT ATTORNEY IV	BU07	Add flexible preamble and move BAR membership to Licenses and Certifications section
COMM DISEASE INVESTIGATOR	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
COMMUNITY HEALTH NURSE I	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
COMMUNITY HEALTH NURSE II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
CORRECTIONAL NURSE I	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
CORRECTIONAL NURSE II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
CORRECTIONAL NURSE SUPERVISOR	BU05	Add flexible preamble and move license/certifications to Licenses and Certificates section
CROSS CONNECTION INSPECTOR	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
DEPUTY COUNTY COUNSEL I	BU12	Add flexible preamble and move BAR membership to Licenses and Certifications section
DEPUTY COUNTY COUNSEL II	BU12	Add flexible preamble and move BAR membership to Licenses and Certifications section
DEPUTY COUNTY COUNSEL III	BU12	Add flexible preamble and move BAR membership to Licenses and Certifications section
DEPUTY COUNTY COUNSEL IV	BU12	Add flexible preamble and move BAR membership to Licenses and Certifications section
DEPUTY DIRECTOR-PLANNING AND BUILDING	BU08	Add flexible preamble and move license/certifications to Licenses and Certificates section
DEPUTY DISTRICT ATTORNEY I	BU04	Add flexible preamble and move BAR membership to Licenses and Certifications section
DEPUTY DISTRICT ATTORNEY II	BU04	Add flexible preamble and move BAR membership to Licenses and Certifications section
DEPUTY DISTRICT ATTORNEY III	BU04	Add flexible preamble and move BAR membership to Licenses and Certifications section
DEPUTY DISTRICT ATTORNEY IV	BU04	Add flexible preamble and move BAR membership to Licenses and Certifications section
DIV MGR BEHAVIORAL HEALTH	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
DIV MGR- PUBLIC HEALTH NURSING SERVICES	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
FORENSIC PATHOLOGIST	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
LICENSED PSYCH TECH/LV NURSE II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
LICENSED PSYCH TECH/LV NURSE III	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
M.H. MEDICAL DIRECTOR	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
M.H. NURSE I	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
M.H. NURSE II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
M.H. NURSE III	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
PARALEGAL	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
PHYS OR OCCUPATIONAL THER II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
PSYCHOLOGIST	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
PUBLIC HEALTH MICROBIOL II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
PUBLIC HEALTH NURSE II	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
SR PHYS OR OCCUPATIONAL THER	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
SR PUBLIC HEALTH NURSE	BU01	Add flexible preamble and move license/certifications to Licenses and Certificates section
STAFF PHYSICIAN	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
STAFF PSYCHIATRIST	BU07	Add flexible preamble and move license/certifications to Licenses and Certificates section
SUPERVISING AG/WEIGHTS & MEASURES INSPEC	BU05	Add flexible preamble and move license/certifications to Licenses and Certificates section
SUPV PUBLIC HEALTH NURSE	BU05	Add flexible preamble and move license/certifications to Licenses and Certificates section



TO: Civil Service Commission

DATE: July 24, 2024

FROM: Kathryn Smith, Human Resources Analyst

SUBJECT: Revised Classification: Paralegal

New Classification: Senior Paralegal

Departments: District Attorney's Office

Appointing Authorities: Dan Dow, District Attorney

RECOMMENDATION

It is recommended the Commission approve the revisions to the Paralegal classification and the creation of the Senior Paralegal classification and specification as proposed. The proposed revisions to the current Paralegal specification will modernize the language to accurately describe the classification's job duties and employment standards in accordance with current County standards, as well as broaden the identified types of case work that may be performed to allow the classification to be utilized by additional County departments. The creation of the Senior Paralegal classification will enable the District Attorney's Office to employ positions that will perform critical work related to advanced or specialized cases in support of County attorneys and lead others in the performance of paralegal and related duties.

BACKGROUND

The Paralegal classification was adopted by the Civil Service Commission and approved by the Board of Supervisors in June 2004. Paralegal positions are currently allocated exclusively to the District Attorney's Office (Department), with four paralegal staff providing support to 39 prosecuting attorneys. The Department prosecutes felony, misdemeanor, juvenile and certain civil cases in the Superior Court. Paralegal staff are responsible for performing a variety of paraprofessional legal work in support of, and under the technical direction of, prosecuting attorneys on both civil and criminal cases with varying degrees of complexity and sensitivity. They are also responsible for fulfilling specific assignments within the department that are essential to operational efficiency, such as coordinating restitutions and claims, which involves acting as a liaison with outside state and local agencies and recommending amounts of restitution ordered for cases.

DISCUSSION

The District Attorney's Office receives a consistently high volume of cases, averaging approximately 12,000 adult criminal cases and 100 to 200 juvenile criminal case referrals per year. In addition, the Department referred 700 misdemeanor cases to the First Time Offender Misdemeanor Diversion program in the 2023-2024 fiscal year. The paraprofessional support duties provided by paralegals play a vital role in case preparation and planning, directly impacting the attorneys' ability to expeditiously prosecute a high volume of diverse cases. In discussions with the Department, more advanced criminal case types, such as homicides and human trafficking, as well as complex civil cases such as financial or environmental fraud cases, require assigned paralegal staff to have advanced knowledge and experience in order to provide adequate support to attorneys. Less advanced incumbents in the Paralegal classification are normally assigned to less complex cases, such as misdemeanor cases, and shadow or support more experienced paralegals in the more complex cases to gain experience. The Department also has a need for certain paralegal staff to perform advanced specialized assignments with a high level of independence and responsibility with limited supervision, such as bate stamping, statistical research, and reporting for certain department programs or processes.

The minimum qualifications set forth in the current Paralegal class specification only require possession of a paralegal certificate or equivalent, as provided by California Business and Professions Code Section 6450 and require no additional advanced education and/or experience working as a paralegal. Entry-

level paralegals need further training and technical oversight from more experienced paralegals to be able to successfully support attorney staff and perform specialized assignments. The current Paralegal specification does not adequately represent these more advanced job duties and requisite knowledge and abilities essential to the successful operations of the department.

Currently, the Paralegal job specification only allows for paralegals to be used in departments that handle criminal cases. However, there is also a potential need for paralegals to support attorneys in departments that handle civil cases, such as County Counsel.

It is recommended that the Commission approve the addition of a single-level Senior Paralegal classification and the proposed revisions to the existing Paralegal classification. Below is a summary of the recommended changes:

- **Create a new single-level Senior Paralegal classification.** This new classification is intended for employees who perform advanced and specialized paralegal duties, and who function as lead workers over other Paralegal staff. Through discussions with the Department, it was identified that only a limited number of positions are needed to function at the Senior Paralegal level. As such, the new classification is recommended to be a single-level classification instead of as part of a career series. Minimum qualifications for the Senior Paralegal classification account for the additional experience and more advanced education that typically provides the knowledge, skills, and abilities necessary to perform the job effectively.
- **Update the current Paralegal classification** to modernize the specification language to accurately describe the classification's job duties and employment standards and ensure the specification formatting is consistent with current County standards. Distinguishing characteristics are also incorporated into the specification to differentiate the classification from the new Senior Paralegal classification and from other clerical and technical legal support classifications within the County. In addition, the types of case work identified in the specification were broadened to allow the classification to be utilized by other County departments with attorneys.
- **Add flexible preamble language** to the Education and Experience subsection of both classifications, consistent with the Commission's previous approval to add flexible preamble language to appropriate classifications in January 2023.

Attached are redline and clean versions of the recommended changes. These changes are not expected to impact reporting relationships or organizational structures within the District Attorney's Office.

RESULT

The proposed revisions to the Paralegal classification and the addition of the Senior Paralegal classification addresses the Department's needs by ensuring the Paralegal job specification accurately describes and employment standards and by creating a needed senior level classification for employees who are assigned the most advanced criminal and civil cases and function as a lead worker within the unit. These revisions also allow the Paralegal and Senior Paralegal classification to be used in other County departments who have attorneys on staff.

OTHER AGENCY INVOLVEMENT

The District Attorney's Office and County Counsel's Office were involved in the development of these proposed changes and concur with the specification changes as proposed. These revisions were also reviewed by the San Luis Obispo County Employees Association (SLOCEA), which represents employees in the Paralegal classification.

Attachments:

1. Paralegal redline version
2. Paralegal clean version
3. Proposed Senior Paralegal
4. Current District Attorney's Office Organizational Chart
5. Proposed District Attorney's Office Organizational Chart

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo County**

5 **PARALEGAL**

7 **DEFINITION:**

8 Under general supervision, ~~assists performs a variety of paraprofessional legal work supporting~~
9 ~~County attorneys in civil or criminal cases, assignments, and other legal matters in a public agency~~
10 ~~legal office as needed on routine legal research including drafting and analyzing legal documents;~~
11 ~~and does other related work as required.~~

13 **DISTINGUISHING CHARACTERISTICS:**

14 ~~Incumbents in the Paralegal classification This class perform paraprofessional legal work in support~~
15 ~~of County attorneys to utilize the services of incumbents for subprofessional legal work including~~
16 ~~conducting legal research, drafting and analyzing legal documents, and other related work.~~

17 Incumbents ~~will not do not be permitted to~~ perform duties constituting the practice of law which is
18 limited to the County's practicing attorneys.

19
20 ~~The Paralegal classification is distinguished from the Legal Clerk classification in that Legal Clerks~~
21 ~~perform specialized clerical work of a legal nature, while the Paralegal classification performs~~
22 ~~direct legal support work to County attorneys which requires advanced professional training in~~
23 ~~law, legal proceedings, and documentation.~~

25 **TYPICAL TASKS and REPRESENTATIVE DUTIES:**

26 **(Not in order of importance)**

- 27 • Prepares legal documents under the technical direction of an attorney such as appeals,
28 pleadings, complaints, subpoenas, notices, petitions, discovery requests, contracts, court
29 orders, and service agreements; pPerforms and summarizes legal research under the
30 technical direction of an attorney.
- 31 • Completes and files documents with the court; monitors court cases and ensures all
32 documents are filed and on calendar according to court rules and regulations.

- Prepares and coordinates exhibits, evidence, discovery, witnesses, and depositions for trial.
- Gathers, interprets, and analyzes information regarding laws, rules, regulations, ordinances, court decisions, records requests, and other related research items.
- Assists attorneys in case planning, development, and management.
- Collects, compiles, and utilizes technical information to make independent decisions and recommendations.
- Prepares communications and written materials such as reports, spreadsheets, presentations, and statistical data; coordinates and performs related statistical, grant tracking, and administrative work.
- Conducts and reviews client and witness interviews.
- Responds to inquiries and provides information to assist the public, other County departments, other public agencies, outside counsel, and defendants on the telephone and/or in person regarding cases or other legal inquiries, and/or requests for technical or general information; maintains law library.
- Performs other related duties as assigned. Performs legal research; handles criminal discovery, including requesting, obtaining, copying, billing, and maintaining files on such; completes special projects regarding discovery documentation and exhibit preparation.
 - Case planning, development and management; assists in preparing court orders or other documents; assists in obtaining prior felony packets for defendants qualifying for "2 or 3 strike" cases and ensures their accuracy upon receipt.
 - Assists in compilation of budget in relation to case management; keeps and maintains checking accounts; maintains records of state prosecutions and prepares claims to the state.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices and, procedures, equipment, and methods
- County government organization, functions and procedures
- Legal terminology, methods/processes, procedures, forms, and formatting for legal documents and forms
- Trial preparation and procedure
- Principles, concepts and methodologies of legal research and analysis

- General legal principles and application
- Federal, state, and local laws and regulations, codes, rules and ordinances governing confidentiality of legal records and proceedings
- Recordkeeping, report preparation, and filing methods

Ability to:

- Perform legal research and analysis
- Prepare a variety of legal documents, reports, and other statistical and narrative written materials
- ~~Accurately compile data and compose varied and difficult reports and correspondence~~
- Use proper grammar, spelling and punctuation
- Make Perform accurate computations
- Handle confidential and sensitive information
- Work under pressure and deal with emergencies effectively using tact and discretion
- Communicate effectively, both verbally and in writing, with the public, attorneys, peers, subordinates, and other agencies
- Work effectively and maintain positive ~~Establish and maintain effective~~ working relationships with others, including those of diverse perspectives using interpersonal skills the general public, officials and employees
- Analyze situations accurately and adopt effective courses of action
- Keep and maintain accurate records and reports
- Use computers and related technology efficiently
- Operate ~~various a variety of~~ office equipment, ~~including computer terminals~~

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 high school or possession of a G.E.D. certificate.

~~The minimum qualifications for this classification must be met as set forth in the California Business and Professions Code section 6450 et seq. and continuing education requirements must be~~

97 ~~maintained throughout employment. The minimum qualifications will be announced at the time of~~
98 ~~recruitment.~~

99
100 **LICENSES/CERTIFICATES:**

101 Possession of a paralegal certificate or equivalent as described in the California Business and
102 Professions Code Section 6450 et seq. is required at the time of application and must be
103 maintained throughout employment, including mandatory continuing legal education as
104 described in subdivision (d).

105
106 Certain positions within this classification may require driving. When driving is an essential
107 function of the position, a valid CALIFORNIA driver's license will be required at the time of
108 appointment.

109
110 **Other Specifications**

111 Recruitment for these classifications will be conducted according to the requirements of the
112 position and the specialized division(s) or program(s) in which a vacancy exists.

113
114 This class specification generally describes the duties and responsibilities characteristic of the
115 position(s) within this class. The duties of a particular position within a multi-position class may
116 vary from the duties of other positions within the class. Accordingly, the essential functions of a
117 particular position (whether it be a multi-position class or a single-position class) will be identified
118 and used by medical examiners and hiring authorities in the selection process. If you have any
119 questions regarding the duties or the working conditions of the position, please contact the
120 Personnel Department at (805) 781-5959.

121
122 Adopted: 06-23-04

123 BOS Approved: 06-22-04

124 Revised: xx-xx-xx

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

5 **PARALEGAL**

7 **DEFINITION:**

8 Under general supervision, performs a variety of paraprofessional legal work supporting County
9 attorneys in civil or criminal cases, and other legal matters.

11 **DISTINGUISHING CHARACTERISTICS:**

12 Incumbents in the Paralegal classification perform paraprofessional legal work in support of County
13 attorneys including conducting legal research, drafting and analyzing legal documents, and other
14 related work. Incumbents do not perform duties constituting the practice of law which is limited to
15 the County's practicing attorneys.

17 The Paralegal classification is distinguished from the Legal Clerk classification in that Legal Clerks
18 perform specialized clerical work of a legal nature, while the Paralegal classification performs
19 direct legal support work to County attorneys which requires advanced professional training in
20 law, legal proceedings, and documentation.

22 **TYPICAL TASKS and REPRESENTATIVE DUTIES:**

23 **(Not in order of importance)**

- 24 • Prepares legal documents under the technical direction of an attorney such as appeals,
25 pleadings, complaints, subpoenas, notices, petitions, discovery requests, contracts, court
26 orders, and service agreements; performs and summarizes legal research under the
27 technical direction of an attorney.
- 28 • Completes and files documents with the court; monitors court cases and ensures all
29 documents are filed and on calendar according to court rules and regulations.
- 30 • Prepares and coordinates exhibits, evidence, discovery, witnesses, and depositions for trial.
- 31 • Gathers, interprets, and analyzes information regarding laws, rules, regulations, ordinances,
32 court decisions, records requests, and other related research items.

Attachment 2

- 33 • Assists attorneys in case planning, development, and management.
- 34 • Collects, compiles, and utilizes technical information to make decisions and
- 35 recommendations.
- 36 • Prepares communications and written materials such as reports, spreadsheets,
- 37 presentations, and statistical data; coordinates and performs related statistical, grant
- 38 tracking, and administrative work.
- 39 • Conducts and reviews client and witness interviews.
- 40 • Responds to inquiries and provides information to the public, other County departments,
- 41 other public agencies, outside counsel, and defendants regarding cases or other legal
- 42 inquiries.
- 43 • Performs other related duties as assigned.

45 **EMPLOYMENT STANDARDS:**

46 **Knowledge of:**

- 47 • Modern office practices and procedures
- 48 • County government organization, functions and procedures
- 49 • Legal terminology, processes, procedures, forms, and formatting for legal documents
- 50 • Trial preparation and procedure
- 51 • Principles, concepts and methodology of legal research and analysis
- 52 • General legal principles and application
- 53 • Federal, state, and local laws and regulations governing confidentiality of legal records and
- 54 proceedings
- 55 • Recordkeeping, report preparation, and filing methods

57 **Ability to:**

- 58 • Perform legal research and analysis
- 59 • Prepare a variety of legal documents, reports, and other statistical and narrative written
- 60 materials
- 61 • Use proper grammar, spelling and punctuation
- 62 • Perform accurate computations
- 63 • Handle confidential and sensitive information
- 64 • Work under pressure and deal with emergencies effectively using tact and discretion

Attachment 2

- 65 • Communicate effectively, both verbally and in writing, with the public, attorneys, peers,
66 subordinates, and other agencies
- 67 • Work effectively and maintain positive working relationships with others, including those of
68 diverse perspectives using interpersonal skills
- 69 • Analyze situations accurately and adopt effective courses of action
- 70 • Keep and maintain accurate records and reports
- 71 • Use computers and related technology efficiently
- 72 • Operate a variety of office equipment

73

74 **EDUCATION AND EXPERIENCE:**

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

77

78 Graduation from high school or possession of a G.E.D. certificate.

79

80 **LICENSES/CERTIFICATES:**

81 Possession of a paralegal certificate or equivalent as described in the California Business and
82 Professions Code Section 6450 et seq. is required at the time of application and must be
83 maintained throughout employment, including mandatory continuing legal education as
84 described in subdivision (d).

85

86 Certain positions within this classification may require driving. When driving is an essential
87 function of the position, a valid CALIFORNIA driver's license will be required at the time of
88 appointment.

89

90 **Other Specifications**

91 Recruitment for these classifications will be conducted according to the requirements of the
92 position and the specialized division(s) or program(s) in which a vacancy exists.

93

94 This class specification generally describes the duties and responsibilities characteristic of the
95 position(s) within this class. The duties of a particular position within a multi-position class may
96 vary from the duties of other positions within the class. Accordingly, the essential functions of a

Attachment 2

97 particular position (whether it be a multi-position class or a single-position class) will be identified
98 and used by medical examiners and hiring authorities in the selection process. If you have any
99 questions regarding the duties or the working conditions of the position, please contact the
100 Personnel Department at (805) 781-5959.

101

102 Adopted: 06-23-04

103 BOS Approved: 06-22-04

104 Revised: xx-xx-xx

DRAFT

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

5 **SENIOR PARALEGAL**

7 **DEFINITION:**

8 Under general supervision, performs a variety of paraprofessional legal work supporting County
9 attorneys in advanced or specialized civil or criminal cases, and other legal matters; functions as a
10 leadworker by training, assigning work, and providing technical oversight of other paralegal and
11 clerical staff.

13 **DISTINGUISHING CHARACTERISTICS:**

14 Incumbents in the Senior Paralegal classification perform advanced and complex paraprofessional
15 legal work including conducting legal research, drafting and analyzing legal documents, and other
16 related work. Incumbents do not perform duties constituting the practice of law which is limited to
17 the County's practicing attorneys.

19 The Senior Paralegal classification is distinguished from the Paralegal classification in that Senior
20 Paralegals are assigned advanced or specialized trial cases or assignments, function as
21 leadworkers by training and directing the work of other paralegal or clerical staff, and work
22 independently with limited supervision.

24 **TYPICAL TASKS and REPRESENTATIVE DUTIES:**

25 **(Not in order of importance)**

- 26 • Prepares legal documents under the technical direction of an attorney such as appeals,
27 pleadings, complaints, subpoenas, notices, petitions, discovery requests, contracts, court
28 orders, and service agreements; performs and summarizes legal research under the
29 technical direction of an attorney.
- 30 • Completes and files documents with the court; monitors court cases and ensures all
31 documents are filed and on calendar according to court rules and regulations.
- 32 • Prepares and coordinates exhibits, evidence, discovery, witnesses, and depositions for trial.

Attachment 3

- 33 • Gathers, interprets, and analyzes information regarding laws, rules, regulations, ordinances,
34 court decisions, records requests, and other related research items.
- 35 • Assists attorneys with complex and advanced criminal or civil cases; may operate as a project
36 lead for assigned cases.
- 37 • Collects, compiles, and utilizes technical information to make independent decisions and
38 recommendations.
- 39 • Monitors and performs advanced or specialized assignments requiring a high level of
40 independence and responsibility such as bate stamping, statistical research, and reporting.
- 41 • Prepares communications and written materials such as reports, spreadsheets,
42 presentations, and statistical data; coordinates and performs related statistical, grant
43 tracking, and administrative work.
- 44 • Assists attorneys in case planning, development, and management.
- 45 • Conducts and reviews client and witness interviews.
- 46 • Responds to inquiries and provides information to the public, other County departments,
47 other public agencies, outside counsel, and defendants regarding cases or other legal
48 inquiries.
- 49 • Leads, trains, and provides technical oversight of paralegal or clerical staff.
- 50 • Assists in the development of assignment schedules for paralegal staff.
- 51 • Processes and organizes highly sensitive and confidential information, exhibits, and
52 evidence.
- 53 • Performs other related duties as assigned.

55 **EMPLOYMENT STANDARDS:**

56 **Knowledge of:**

- 57 • Modern office practices and procedures
- 58 • County government organization, functions, and procedures
- 59 • Legal terminology, processes, procedures, forms, and formatting for legal documents
- 60 • Trial preparation and procedure
- 61 • Principles, concepts, and methodology of legal research and analysis
- 62 • General legal principles and application
- 63 • Federal, state, and local laws and regulations governing confidentiality of legal records and
64 proceedings

Attachment 3

- 65 • Recordkeeping, report preparation, and filing methods
- 66 • Techniques of effective training, evaluation of training progress, and work planning

67 **Ability to:**

- 68 • Perform legal research and analysis
- 69 • Prepare a variety of legal documents, reports, and other statistical and narrative written
70 materials
- 71 • Use proper grammar, spelling, and punctuation
- 72 • Perform accurate computations
- 73 • Handle confidential and sensitive information
- 74 • Work under pressure and deal with emergencies effectively using tact and discretion
- 75 • Train, mentor, lead, and coordinate the work of others
- 76 • Communicate effectively, both verbally and in writing, with the public, attorneys, peers,
77 subordinates, and other agencies
- 78 • Work effectively and maintain positive working relationships with others, including those of
79 diverse perspectives using interpersonal skills
- 80 • Analyze situations accurately and adopt effective courses of action
- 81 • Keep and maintain accurate records and reports
- 82 • Use computers and related technology efficiently
- 83 • Operate a variety of office equipment

84 **EDUCATION AND EXPERIENCE:**

85 A combination of education, training, and experience resulting in the required knowledge, skills,
86 and abilities. An example of qualifying education and experience includes:
87

- 88 1. An associates degree from an accredited institution AND five years of experience as a
89 paralegal; **or**
- 90 2. Graduation from an accredited institution with a bachelor's degree in political science,
91 criminal justice, business administration, or related field AND three years of experience as a
92 paralegal.
93

94 **LICENSES/CERTIFICATES:**

95 Possession of a paralegal certificate or equivalent as described in California Business and
96

Attachment 3

97 Professions Code Section 6450 et seq. is required at the time of application and must be
98 maintained throughout employment, including mandatory continuing legal education as
99 described in subdivision (d).

100

101 Certain positions within this classification may require driving. When driving is an essential
102 function of the position, a valid CALIFORNIA driver's license will be required at the time of
103 appointment.

104

105 **Other Specifications**

106 Recruitment for these classifications will be conducted according to the requirements of the
107 position and the specialized division(s) or program(s) in which a vacancy exists.

108

109 This class specification generally describes the duties and responsibilities characteristic of the
110 position(s) within this class. The duties of a particular position within a multi-position class may
111 vary from the duties of other positions within the class. Accordingly, the essential functions of a
112 particular position (whether it be a multi-position class or a single-position class) will be identified
113 and used by medical examiners and hiring authorities in the selection process. If you have any
114 questions regarding the duties or the working conditions of the position, please contact the
115 Personnel Department at (805) 781-5959.

116

117 Adopted: xx-xx-xx

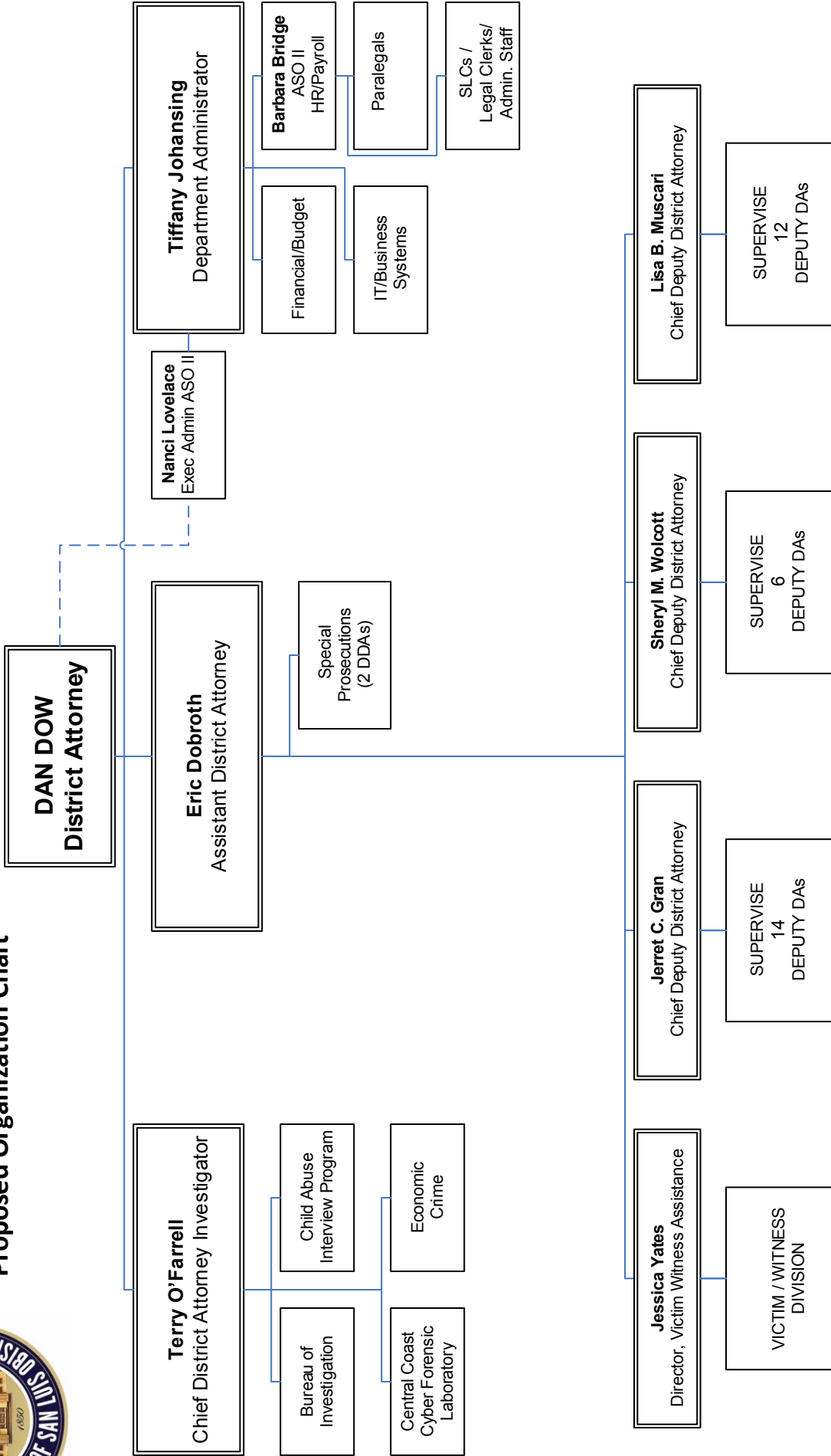
118 BOS Approved:

119 Revised:



**Office of the District Attorney
County of San Luis Obispo
Proposed Organization Chart**

Revised November 1, 2023
"Bringing justice and safety to our community by aggressively and fairly prosecuting crime and protecting the rights of crime victims."

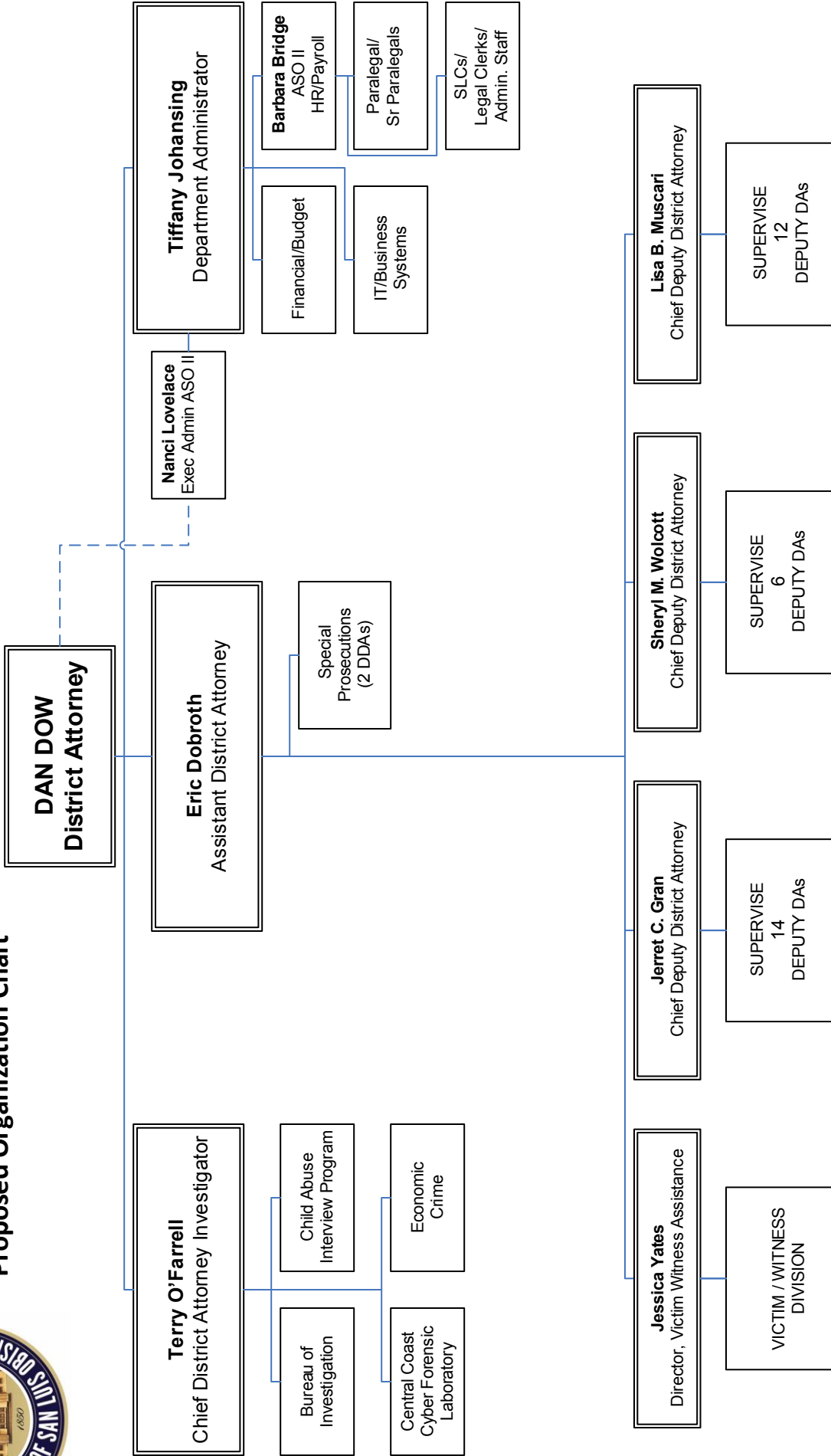


Our values are: Integrity, Professionalism, Accountability, Communication, and Collaboration.



**Office of the District Attorney
County of San Luis Obispo
Proposed Organization Chart**

Revised November 1, 2023
"Bringing justice and safety to our community by aggressively and fairly prosecuting crime and protecting the rights of crime victims."





COUNTY OF SAN LUIS OBISPO
DEPARTMENT OF HUMAN RESOURCES

Jamie Russell *Director*

TO: Civil Service Commission

DATE: July 24, 2024

FROM: Chrystal Pope, Human Resources Analyst
Kathryn Smith, Human Resources Analyst

SUBJECT: New Classification: Sheriff's Deputy Director – Support Services Bureau
Departments: Sheriff-Coroner
Appointing Authorities: Sheriff-Coroner Ian Parkinson

RECOMMENDATION

It is recommended that the Commission approve the creation of the Sheriff's Deputy Director – Support Services Bureau classification and specification as proposed.

BACKGROUND

The San Luis Obispo County Sheriff's Office provides essential and critical services to more than 120,000 people spread out over more than 3,000 square miles. The organizational structure of the Sheriff's Office is divided into four major bureaus to provide these services: the Patrol Operations Bureau, Investigations Bureau, Custody Operations Bureau, and Support Services Bureau. The Support Services Bureau is primarily comprised of support divisions including Finance, Human Resources, Information Technology, and Records Management.

In recent years, the Support Services functions have experienced significant growth along with increases in staffing, legal mandates, reporting requirements, community services, partnerships, and technology needs. Previously, oversight of the divisions within the Support Services Bureau was divided between

two management positions, including a Department Administrator position reporting to the Undersheriff and an Administrative Services Manager position reporting directly to the Sheriff-Coroner. The span of control and responsibility associated with the Support Services Bureau requires a more centralized, executive leadership position due to the addition of personnel, functions, legal reporting requirements and the increased fiduciary and technical responsibilities across the divisions of the Support Services Bureau.

DISCUSSION

It is recommended that the Commission approve the creation of a Sheriff's Deputy Director – Support Services Bureau classification in order to create a single senior management position within the Sheriff's Office that will direct the strategic planning, operational efficiency, and compliance with evolving laws and regulations impacting the non-sworn operations of the Sheriff's Office. The proposed Sheriff's Deputy Director – Support Services Bureau will report to the Undersheriff and will oversee planning, organizing, directing, coordinating and evaluating the operations within the Support Services Bureau. This will be a senior management position within the Sheriff's executive management team and will be responsible for directing the Support Services Bureau within the Sheriff's Office, which encompasses multiple major functional areas, including but not limited to, Finance, Human Resources, Information Technology, and Records Management.

The proposed classification will be responsible for managing the work of the Support Services Bureau in coordination with the other bureaus within the Sheriff's Office and will consult with and advise the Sheriff-Coroner and Undersheriff on general departmental goals, policies, plans and procedures relating to the activities of the Support Services divisions. The position will also direct communications, resources and personnel necessary to meet department needs and oversee the development and implementation of programs, projects, functions, services, goals, objectives, systems, and activities. For an incumbent to perform at this level, it is necessary that they have knowledge of the principles and practices of a law enforcement agency at the management level or above. Incumbents must also know how to understand and apply applicable laws, codes, regulations, policies, and procedures pertinent to the administrative operations of a law enforcement agency. The minimum qualifications for this position have been

developed in collaboration with Human Resources and the Sheriff's Office to ensure alignment with the strategic goals of the organization.

Attached is the proposed class specification, along with current and proposed organizational charts showing the impacts to reporting relationships and organizational structures within the Sheriff's Office.

RESULT

The creation of this classification will complement the organizational structure of the current executive team within the Sheriff's Office, which currently consists of two Sheriff's Chief Deputies and a Sheriff's Correctional Captain. The addition of the Sheriff's Deputy Director – Support Services Bureau will streamline the chain of command and ensure that executive oversight extends to all four major bureaus within the Sheriff's Office. This role will be pivotal in providing strategic direction, promoting operational efficiency, and streamlining operations across the Support Service divisions. Moreover, the proposed classification will enhance communication with the Sheriff-Coroner to accurately define the operational duties, needs, and goals of the Support Services Bureau. The proposed class specification accurately describes the duties and requirements specific to the classification, enabling the County to attract qualified candidates effectively and provide internal promotional opportunities. The specification will be used as a basis for accurate classification, compensation, and performance management.

OTHER AGENCY INVOLVEMENT

The Sheriff's Office was involved in the development of the proposed classification and concurs with the specification as proposed.

Attachments:

1. Sheriff's Deputy Director - Support Services Bureau – Proposed Class Specification
2. Current Organizational Chart
3. Proposed Organizational Chart

1 **HUMAN RESOURCES DEPARTMENT**

2 **County of San Luis Obispo**

3
4 **SHERIFF'S DEPUTY DIRECTOR – SUPPORT SERVICES BUREAU**

5
6 **DEFINITION:**

7 Under general direction, plan, organize, direct, coordinate, and evaluate the operations and staff
8 of the Support Services Bureau of the Sheriff's Office, including but not limited to, Finance, Human
9 Resources, Information Technology, Administration, and Records Management; coordinate and
10 direct communications, resources, and personnel in support of department services and
11 administration to ensure smooth and efficient bureau or function activities; and supervise and
12 evaluate the performance of assigned personnel.

13
14 **DISTINGUISHING CHARACTERISTICS:**

15 This is the highest level non-sworn management classification in the Sheriff's Office and is
16 responsible for directing the operations of the Support Services Bureau. Incumbents in this class
17 report directly to the Undersheriff, and supervise management and professional staff, including
18 Department Administrators, within the Support Services Bureau of the Sheriff's Office.

19
20 **TYPICAL TASKS AND REPRESENTATIVE DUTIES:**

21 (Not in order of importance)

- 22 • Directs, assigns, and manages activities within the Support Services Bureau of the Sheriff's
23 Office; consults with and advises the Sheriff and Undersheriff on matters relating to the
24 activities of the assigned areas of responsibility; develops, maintains, and articulates
25 strategic plans of the assigned functional areas(s); establishes and maintains departmental
26 timelines and priorities; ensures related functions and activities comply with established
27 standards, requirements, internal controls, laws, codes, statutes, regulations, ordinances,
28 policies and procedures.
- 29 • Coordinates the work of the Bureau with that of the other bureaus; directs
30 communications, resources and personnel to meet department needs and to ensure
31 smooth and efficient bureau activities; oversees the development and implementation of

bureau programs, projects, functions, services, goals, objectives, systems and activities;
ensures proper and timely resolution of issues, conflicts and discrepancies; review reports
prepared by subordinate personnel.

- Manages and evaluates the performance of staff within the bureau using advanced managerial and leadership techniques; interviews and selects employees and recommend transfers, reassignment, termination and disciplinary actions; coordinates subordinate work assignments and reviews work to ensure compliance with established standards, requirements and procedures.
- Consults with the Sheriff and Undersheriff on general departmental goals, policies, plans and procedures; monitors and analyzes bureau programs, activities, and related activities for financial effectiveness and operational efficiency; ensures proper and timely resolution of issues and problems related to assigned programs and functions.
- Directs and participates in the development and preparation of the annual budget; prepares a variety of financial, statistical and operating reports; ensures mandated reports are completed and submitted to appropriate local, State or Federal agencies according to established timelines; controls and authorizes expenditures in accordance with established limitations.
- Collaborates with other administrators, personnel, and outside agencies in the development and implementation of department projects, goals, objectives, services and activities; attends and directs meetings as assigned; prepares and delivers presentations concerning assigned programs and functions.
- Acts on behalf of the Sheriff on support operations, as directed.
- Performs other related work as required.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of strategic planning, management analysis, personnel management, information systems applications and organizational development
- Practices, procedures, and techniques involved in the development and implementation of bureau programs, projects, functions, services, goals, objectives, systems, and activities

Attachment 1

- 62 • Principles and practices of employee management and supervision, including work
- 63 planning and evaluation, performance management, and development
- 64 • Statistical methods for business and management analysis
- 65 • Legal terminology, processes, and procedures related to law enforcement and correctional
- 66 functions
- 67 • Applicable laws, codes, regulations, policies, and procedures
- 68 • Budget preparation and control
- 69 • Public relations techniques
- 70 • Effective verbal and written communication and interpersonal skills
- 71 • Contract preparation, review, and negotiation

72
73 **Ability to:**

- 74 • Plan, direct and organize the work of assigned functional areas
- 75 • Lead and direct communications, resources, and personnel to meet department needs and
- 76 ensure smooth and efficient bureau activities
- 77 • Direct, supervise, and evaluate the performance of assigned personnel
- 78 • Oversee the development and implementation of bureau programs, projects, functions,
- 79 services, goals, objectives, systems, and activities
- 80 • Collaborate with other administrators, personnel and outside agencies in the strategic
- 81 development and implementation of program and function projects, goals, objectives,
- 82 services, and activities
- 83 • Partner effectively with public agencies, businesses, non-profit organizations, and
- 84 community stakeholders to effectively lead collaborative initiatives with multiple
- 85 stakeholders
- 86 • Conduct complex analytical studies of administrative procedures and policies
- 87 • Provide consultation and technical expertise concerning bureau operations and activities
- 88 • Monitor, analyze, and modify policies, procedures, and programs to enhance the financial
- 89 effectiveness and operational efficiency of an assigned division
- 90 • Communicate effectively both verbally and in writing
- 91 • Apply and explain rules, regulations, policies, and procedures
- 92 • Collect, interpret, and evaluate budgetary, statistical, and accounting data

- 93 • Prepare comprehensive narrative and statistical reports
- 94 • Work effectively and maintain positive working relationships with others, including those of
- 95 diverse perspectives using interpersonal skills
- 96 • Support and follow County and departmental policies, goals, guiding principles, and
- 97 Mission – Vision – Values Statement
- 98 • Operate a computer and assigned office equipment
- 99 • Maintain a safe and orderly work area

100

101 **EDUCATION AND EXPERIENCE:**

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

104

105 Graduation from an accredited four-year college or university with a bachelor's degree in business
106 administration, public administration, organizational development, criminal justice or a closely
107 related field. In addition, six years of increasingly responsible, professional-level experience
108 overseeing complex financial or administrative operations and programs within a law
109 enforcement agency, including two years of experience in a management position.

110

111 **LICENSES AND CERTIFICATES:**

112 Certain positions within the classification may require driving. When driving is an essential
113 function of the position, a valid CALIFORNIA driver's license will be required at the time of
114 appointment and must be maintained throughout employment.

115

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

123

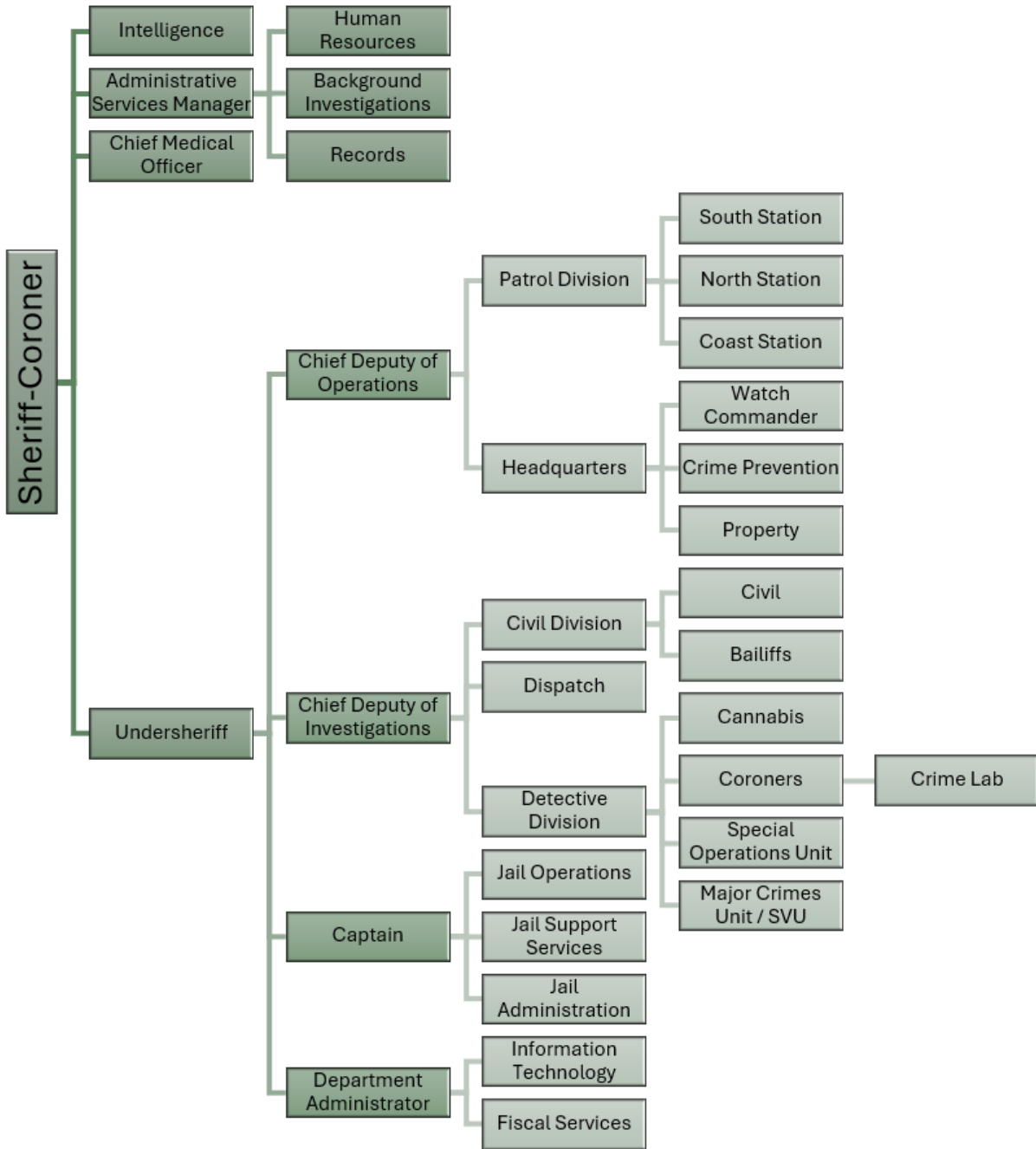
124 Adopted: xx-xx-xx

125 BOS Approved:

126 Revised:

DRAFT

CURRENT ORGANIZATIONAL STRUCTURE



PROPOSED ORGANIZATIONAL STRUCTURE

