

PERSONNEL BOARD

<http://www.ci.richmond.ca.us/1090/Personnel-Board>



REGULAR MEETING
Thursday, March 24, 2022
5:15 p.m.

ALL BOARDMEMBERS WILL PARTICIPATE VIA VIDEO OR TELECONFERENCE



AGENDA

Personnel Board Members

Chair: Steve Early
Mindy Pines
Kyra Worthy

1. ROLL CALL
2. AGENDA REVIEW
3. STATEMENT OF CONFLICT OF INTEREST
4. APPROVAL OF MINUTES
 - a. Regular Meeting of February 24, 2022
5. PUBLIC COMMENT
6. CONSENT AGENDA
None
7. NEW BUSINESS
 - a. APPROVE the Revision and Retitle of Senior Accountant to Accounting Supervisor
 - b. SCHEDULE Personnel Board Hearing request on an appeal of a grievance, alleging a violation of the collective bargaining agreement between the City of Richmond and the Richmond Police Officers Association (RPOA)
8. UNFINISHED/OLD BUSINESS
None
9. REVIEW AND/OR ISSUANCE OF SUBPOENA(S)
None
10. CONSIDERATION OF PROBLEMS AND REPORTS
 - a. RPOA Grievance Appeal Hearing continued from February 24, 2022.
11. ADJOURNMENT

NOTE: Copies of items to be distributed from the Public to the Personnel Board must also include two (2) copies; one (1) for the Secretary to the Board and one (1) for Board Counsel.

COMMUNICATION ACCESS INFORMATION This meeting is being held in a wheelchair accessible location. To request a disability-related accommodation(s) to participate in the meeting, including auxiliary aids or services, please contact Laura Marquez, ADA Coordinator at ADACoordinator@ci.richmond.ca.us or (510) 620-6974 at least three business days before the meeting date.

CORONAVIRUS DISEASE (COVID-19) ADVISORY

Due to the coronavirus (COVID-19) pandemic, Contra Costa County and Governor Gavin Newsom have issued multiple orders requiring sheltering in place, social distancing, and reduction of person-to-person contact. Accordingly, Governor Gavin Newsom has issued executive orders that allow cities to hold public meetings via teleconferencing (Executive Order N-29-20). Both provide updated coronavirus information.

<https://www.coronavirus.cchealth.org>

and

<http://www.ci.richmond.ca.us/3914/Richmond-Coronavirus-Info>

DUE TO THE SHELTER IN PLACE ORDERS, attendance in the Personnel Board meeting will be by teleconference only. Public comment will be confined to items appearing on the agenda and will be limited to the method provided below. Consistent with Executive Order N-29-20, this meeting will utilize teleconferencing only. The following provides information on how the public can participate in this meeting.

How to watch the meeting from home: The meeting may be accessed by using the following Zoom meeting link:

<https://us06web.zoom.us/j/85011892620?pwd=MkV5eDEzRTlOcFdJNFJxOGtaTnZ0Zz09>

Webinar ID: 850 1189 2620 Passcode: ezyKB0

Public comments may be submitted: via email to personnel_board@ci.richmond.ca.us. Email must contain in the subject line **Public Comment**. The email must be submitted on or before Thursday, March 24, 2022 by 12:00 Noon.

Public comment for an agenda item may be submitted by: sending an email to mailto:personnel_board@ci.richmond.ca.us by 12:00 Noon on Thursday, March 24, 2022. The email must contain in the subject line **Public Comment on Agenda item #**. The request must include the following:

- (a) Your Name
- (b) Your Phone Number
- (c) The Item for which you wish to make a Public Comment

Public comment is limited to two (2) minutes.

The City cannot guarantee that its network and/or the site will be uninterrupted.

Record of all public comments: All public comments will be considered a public record, put into the official meeting record, and considered before Personnel Board action. All public comments will be available after the meeting as supplemental materials and will be posted as an attachment to the meeting minutes when the minutes are posted.

Accessibility for Individuals with Disabilities: Upon request, the City will provide for written agenda materials in appropriate alternative formats, or disability related modification or accommodation, including auxiliary aids or services and sign language interpreters, to enable individuals with disabilities to participate in and provide comments at/related to public meetings. Please submit a request, including your name, phone number and/or email address, and a description of the modification, accommodation, auxiliary aid, service or alternative format requested at least two days before the meeting. Requests should be emailed to personnel_board@ci.richmond.ca.us or submitted by phone at 510-620-6588. Requests will be granted whenever possible and resolved in favor of accessibility.

CITY OF RICHMOND, CA
HUMAN RESOURCES MANAGEMENT DEPARTMENT

**PERSONNEL BOARD
REGULAR MEETING**

**TELECONFERENCE VIA ZOOM
450 CIVIC CENTER PLAZA
RICHMOND, CA 94804**

**February 24, 2022
MINUTES**

The regular meeting was called to order by Chair Steve Early at 5:17 p.m. on February 24, 2022.

1. ROLL CALL

Present: Steve Early, Chair
Mindy Pines, Board Member
McKinley Williams, Board Member
Kyra Worthy, Board Member

Absent: None

Deputy City Attorney Jaclyn Gross introduced Pam Lee as Personnel Board counsel during the meeting filling in for Bruce Soublet. A possibility of Bruce Soublet being called as a witness during the RPOA appeals grievance hearing deemed a replacement as counsel to the Personnel Board necessary.

2. AGENDA REVIEW

- None

3. STATEMENT OF CONFLICT OF INTEREST

- None

4. APPROVAL OF MINUTES

- a. Regular Meeting of February 24, 2022.

SPEAKERS:

- None

Board Member Pines made a motion to approve the minutes of January 27, 2022. Chair Early seconded the motion. Minutes were approved by the following vote: YEA: S. Early, M. Pines, M. Williams. K. Worthy. NAY: None. ABSENT: ABSTAIN: None.

Audio recordings of Personnel Board Meetings are available at:
<http://www.ci.richmond.ca.us/index.aspx?NID=1090>

5. PUBLIC COMMENT

SPEAKERS:

Cordell Hindler: email received and read

6. CONSENT AGENDA

- None

7. NEW BUSINESS

SPEAKERS:

- None

8. UNFINISHED/OLD BUSINESS

- None

9. REVIEW AND/OR ISSUANCE OF SUBPOENA(S)

- None

10. CONSIDERATION OF PROBLEMS AND REPORTS

a. RPOA Grievance Appeal Hearing

Counsel Pam Lee informed all parties that the hearing would include evidence and testimony for the record and cautioned not to use Zoom chat since it would not be included as part of the hearing record.

RPOA Grievance Appeal Hearing commenced at 5:30 p.m.

At 9:55 p.m., it was agreed by all parties that the Grievance Appeal Hearing would be continued to the next regularly scheduled meeting on Thursday, March 24, 2022.

11. ADJOURNMENT

Meeting adjourned at approximately 10:00 p.m.

Dorothy Mandujano

From: Cordell Hindler
Sent: Friday, February 18, 2022 4:26 PM
To: Personnel Board
Subject: public comments

This email originated from outside of the City's email system. Do not open links or attachments from untrusted sources.

good Evening, Chair Early, Board Members and Staff,

I do have a couple of items for Placement on the March 24 Agenda:

1. Approval to Revise the Existing Classification of Chief of Staff { Office of the City Manager
2. Approval to Retitle the Existing Classification of Deputy Budget and Financial Services Agency Director

I had Spoken with the Finance Director and she is Okay with it,

The Chief of Staff Does Play an Important Role in Representing the City at Not only City Council, Boards & Commissions

Sincerely
Cordell



STAFF REPORT

HUMAN RESOURCES DEPARTMENT

DATE: March 24, 2022

TO: Chair Early and Members of the Personnel Board

FROM: Anil Comelo, Interim Deputy City Manager

SUBJECT: APPROVE THE REVISION AND RETITLE OF SENIOR ACCOUNTANT TO ACCOUNTING SUPERVISOR

BACKGROUND

The Director of Finance requested the retitle and revision of the Senior Accountant Job Specification to Accounting Supervisor. This classification specification was established on January 3, 1967 and revised on August 26, 1975. There haven't been any revisions since then.

The Human Resources Department recommends the retitle and revision of the classification of Senior Accountant to Accounting Supervisor.

ANALYSIS

The Director of Finance petitioned the Human Resources Department to retitle and revise the Senior Accountant Job Specification to Accounting Supervisor. The purpose was to create a first-line supervisory position in the Finance department to provide oversight for subordinates in Payroll, Budget, and other divisions with the Finance Department. This position differs from the Senior Accountant because it isn't a lead but rather a supervisory role. Human Resources staff surveyed comparable cities and found that the presence of this classification is consistent with other similarly structured Finance departments

On March 4, 2022, the City sent the drafted classification specification to IFPTE Local 21 and invited the union to meet and confer regarding the drafted description. Representatives of IFPTE Local 21 support the revised class specification.

ANALYST: Sharrone Taylor, Principal Personnel Analyst

Attachments: Classification Survey of the City of Richmond Comparable Cities
Proposed Accounting Supervisor Job Specification Clean
Proposed Accounting Supervisor Job Specification Edited
Original Senior Accountant Job Specification

CLASSIFICATION SURVEY OF THE CITY OF RICHMOND’S COMPARBLE CITIES

ACCOUNTING SUPERVISOR SURVEY		
CITY	EQUIVALENT TITLE	CLASS DEFINITION
Oakland	ACCOUNTING SUPERVISOR	This is a first-line supervisory classification. Incumbents perform a variety of supervisory tasks involving complex general ledger accounting and reporting. This classification differs from the lower-level Accountant III in that the incumbent of the latter may provide either lead direction or supervision and performs complex accounting functions.
		The incumbent receives direction from the Controller, Assistant Controller, or other management staff and exercises general supervision over Accountants, Account Clerks, Accounting Technicians, and assigned clerical staff.
Concord	SUPERVISING ACCOUNTANT	This position is the full supervisory level class in the professional accountant series. This class is utilized to perform a variety of complex technical accounting and auditing work requiring extensive knowledge of complex technical accounting or auditing work and the exercise of independent judgment. Incumbents have responsibility for a functional unit within the Finance Department requiring complete supervisory control over professional and clerical staff assigned to the unit while participating in the more complex portions of the work. This class receives direction from the Financial Operations Manager.
Hayward	FINANCE SUPERVISOR	This advanced journey-level classification is characterized by the responsibility to perform and oversee the performance of the most complex and technical activities in various sections of the Finance Department and to supervise, direct and participate in the activities of section staff. These working supervisors will be expected to provide resources, system support and serve as a supervisor providing oversight to division employees. In addition, Finance Supervisors are often the chief point of contact for outside department business managers and key management and supervisory employees to whom the Finance Department provides service.
Richmond	ACCOUNTING SUPERVISOR	This position is the full supervisory level class in the professional accountant series. This class is utilized to perform a variety of complex technical accounting and auditing work requiring extensive knowledge of complex technical accounting or auditing and the exercise of independent judgment. Incumbents have responsibility for a functional unit within the Finance Department requiring complete supervisory control over professional, administrative, and clerical staff assigned to the unit, while participating in the more complex portions of the work and performs other related work as required. This class may receive direction from the Director of Finance and/or from their designee.

CITY OF RICHMOND, CA

Job Class Code: 2465
EEO Class Code: PR-260
Established: 1/3/67
Revision: 8/26/75
Revised:-----

Previous Title: Senior Accountant
Bargaining Unit: IFPTE Local 21
FLSA: Exempt

ACCOUNTING SUPERVISOR (DRAFT)

DEFINITION

This position is the full supervisory level class in the professional accountant series. This class is utilized to perform a variety of complex technical accounting and auditing work requiring extensive knowledge of complex technical accounting or auditing and the exercise of independent judgment. Incumbents have responsibility for a functional unit within the Finance Department requiring complete supervisory control over professional, administrative, and clerical staff assigned to the unit, while participating in the more complex portions of the work and performs other related work as required. This class may receive direction from the Director of Finance and/or from their designee.

CLASS CHARACTERISTICS

Incumbents of positions in this class are primarily responsible for the accounting, cost control, budgetary, payroll, and accounting systems functions. This professional-level classification is distinguished from the Accountant series by the level of supervisory control, program responsibility and high-level of professional knowledge of technical accounting, auditing, budgetary, and payroll responsibilities. This is a working supervisor classification.

EXAMPLES OF DUTIES *(Illustrative Only)*

1. Supervise the preparation, analysis, and maintenance of administrative, budgetary, fiscal, and operational accounting records, systems, and reports.
2. Direct the preparation of special financial reports as mandated by federal, state, and City laws, regulations, or ordinances.
3. Assists in the planning, organizing, directing, and coordination of the City's budget processes.
4. Ensure payment of all properly documented obligations of the City; supervise the issuance and modification of vendor records.
5. Direct, review, and participate in accounting for grants, compliance with grant requirements, and draw down of grants.

CITY OF RICHMOND
ACCOUNTING SUPERVISOR
PAGE 2

6. Monitor general ledger entries and reports for accuracy and for incorporation of adjustments.
7. Direct the preparation of the Comprehensive Annual Financial Report and other special financial reports as mandated by federal, state, and City laws, regulations, or ordinances.
8. Ensure that the general ledger is a proper reflection of current financial activities, including propriety of accounts, internal controls, accounting policies, and petty cash.
9. Performs and reviews a variety of accounting activities including payroll, accounts payable, budget, insurance administration, general and subsidiary ledger accounting, financial reporting, cashiering, records retention, contracts, claims, and internal-external auditing.
10. Reviews and analyzes accounting methods and procedures; suggests changes in accounting procedures.
11. Prepares a variety of complex reports involving statistics, legal requirements, fund accounting and data processing.
12. Establishes and supervises the maintenance of capital improvement and other cost records.
13. Supervises and coordinates external and internal auditing; revises audit reports of agencies using funds under the City's control; makes recommendations concerning the various recording and reporting systems.
14. Ensure that deadlines are met; prepares correspondence.
15. Coordinate and monitor financial management system training with City departments.
16. Serve as liaison for financial purposes within the department and with other departments, auditors, vendors, public agencies, and the public.
17. Supervise, train, and evaluate subordinate staff.
18. Prepare and maintain procedure manuals, records, and reports.
19. Meet with management staff to identify and resolve problems.
20. Serve as acting manager for other divisions in the Finance Department as necessary

KNOWLEDGE, SKILLS, AND ABILITIES

Thorough Knowledge of: the principles and practices of governmental accounting and budgeting; financial analysis; financial control systems and methodology; governmental fund accounting and budgeting; payroll accounting; auditing techniques, principles and practices; modern office management and supervisory principles and practices.

Skill in: obtaining and analyzing complex accounting, fiscal, operating, functional and other data; preparing clear and comprehensive financial analyses and reports; understanding and applying pertinent rules, regulations and laws; devising and supervising the installation of accounting methods forms and

CITY OF RICHMOND
ACCOUNTING SUPERVISOR
PAGE 3

procedures; establishing and maintaining effective work relationship with subordinates, associates and superiors; supervising and reviewing work of accounting staff.

Ability to: prepare government-wide and fund accounting statements for municipal governments. Prepare effective reports and presentations orally and in writing. Examine and verify financial documents, reports, and transactions. Analyze, reconcile, and draw conclusions from financial data. Extract data from and manage complex accounting systems. Interpret federal and state regulations pertaining to municipal government accounting and grant funds. Manage multiple and competing priorities effectively. Supervise, train, and evaluate assigned staff. Utilize computer systems and software applications including automated financial/accounting management systems. Establish and maintain effective working relationships with those contacted in the performance of required duties. To make formal and informal presentations.

MINIMUM QUALIFICATIONS

Any combination of education, experience and training equivalent to graduation from an accredited four-year college or university in a major that can be directly related to the knowledges and ability requirements, AND four years of professional related accounting experience with two years of lead or supervisory experience. Professional experience should demonstrate the application of the knowledge and abilities listed as minimum qualifications.

CITY OF RICHMOND, CA

Job Class Code: 2465
EEO Class Code: PR-260
Established: 1/3/67
Revision: 8/26/75
Revised:-----

Previous Title: Senior Accountant
Bargaining Unit: IFPTE Local 21
FLSA: Exempt

SENIOR ACCOUNTANT ACCOUNTING SUPERVISOR (DRAFT)

DEFINITION

This position is the full supervisory level class in the professional accountant series. -This class is utilized to perform a variety of complex technical accounting and auditing work requiring extensive knowledge of complex technical accounting or auditing and the exercise of independent judgment. -Incumbents have responsibility for a functional unit within the Finance Department requiring complete supervisory control over professional, administrative, and clerical staff assigned to the unit, while participating in the more complex portions of the work and performs does other related work as required. -This class may receives direction from the Director of Finance and/or from their designee. Under general direction, performs the difficult and complex work in accounting and related aspects of financial management; provides lead and technical direction to subordinate accountants and clerks and does other work as required.

CLASS CHARACTERISTICS

Incumbents of positions in this class are primarily responsible for the accounting, cost control, budgetary, payroll, and accounting systems functions. This is a working supervisor class; This professional-level classification is distinguished from the Accountant series by the level of supervisory control, program responsibility and high-level of professional knowledge of technical accounting, and auditing, budgetary, and payroll responsibilities. This is a working supervisor classification; incumbents are required to work at the full journeyman level and provide lead direction to subordinate accountants and supervision to clerical personnel.

MANAGEMENT EXAMPLES OF DUTIES (Illustrative Only)

1. Supervise the preparation, analysis, and maintenance of administrative, budgetary, fiscal, and operational accounting records, systems, and reports.
2. Direct the preparation of special financial reports as mandated by federal, state, and City laws, regulations, or ordinances.
3. Assists in the pPlannings, organizings, directings, and coordinations of the City's budget processes.

CITY OF RICHMOND
SENIOR ACCOUNTANT
ACCOUNTING SUPERVISOR
PAGE 2

4. Ensure payment of all properly documented obligations of the City; supervise the issuance and modification of vendor records.
5. Direct, review, and participate in accounting for grants, compliance with grant requirements, and draw down of grants.
6. Monitor general ledger entries and reports for accuracy and for incorporation of adjustments.
7. Direct the preparation of the Comprehensive Annual Financial Report and other special financial reports as mandated by federal, state, and City laws, regulations, or ordinances.
8. Ensure that the general ledger is a proper reflection of current financial activities, including propriety of accounts, internal controls, accounting policies, and petty cash.
- 4.—Performs and reviews a variety of accounting activities including payroll, accounts payable, budget, insurance administration, general and subsidiary ledger accounting, financial reporting, cashiering, records retention, contracts, claims, and internal-external auditing.
-
- ~~2. Provides lead direction and training to subordinate accountants; reviews performance of subordinates and submits recommendations to supervisor; supervises subordinates in such bookkeeping activities as record disbursements, expenses and tax payments and maintaining accounting controls.~~
- 9.
- ~~3.—~~Reviews and analyzes accounting methods and procedures; ~~—~~suggests changes in accounting procedures.
- 10.
- ~~4.—~~Prepares a variety of complex reports involving statistics, legal requirements, fund accounting and data processing.
- 11.
- ~~5.—~~Establishes and supervises the maintenance of capital improvement and other cost records.
- 12.
- ~~6-13.~~ Supervises and coordinates external and internal auditing; revises audit reports of agencies using funds under the City's control; makes recommendations concerning the various recording and reporting systems.
- ~~14. Answers requests of departments and agencies for information; follows up work assignments to see that deadlines are met; prepares correspondence. Ensure that deadlines are met; prepares correspondence.~~
15. Coordinate and monitor financial management system training with City departments.

CITY OF RICHMOND
SENIOR ACCOUNTANT
ACCOUNTING SUPERVISOR
PAGE 3

16. Serve as liaison for financial purposes within the department and with other departments, auditors, vendors, public agencies, and the public.
17. Supervise, train, and evaluate subordinate staff.
18. Prepare and maintain procedure manuals, records, and reports.
19. Meet with management staff to identify and resolve problems.
20. Serve as acting manager for other divisions in the Finance Department as necessary

MINIMUM QUALIFICATIONS KNOWLEDGE, SKILLS, AND ABILITIES

Thorough Knowledge of: :—the principles and practices of governmental accounting and budgeting; financial analysis; financial control systems and methodology;~~accounting principles, practices and methods.~~

General Knowledge of: governmental fund accounting and budgeting; payroll accounting; auditing techniques, principles and practices; modern office management and supervisory principles and practices.

Skill in:~~obtaining~~in: obtaining and analyzing complex accounting, fiscal, operating, functional and other data; preparing clear and comprehensive financial analyses and reports; understanding and applying pertinent rules, regulations and laws; devising and supervising the installation of accounting methods forms and procedures; establishing and maintaining effective work relationship with subordinates, associates and superiors; supervising and reviewing work of ~~clerical~~ accounting staff.

Ability to: ~~prepare government-wide and fund accounting statements for municipal governments. Prepare effective reports and presentations orally and in writing. Examine and verify financial documents, reports, and transactions. Analyze, reconcile, and draw conclusions from financial data. Extract data from and manage complex accounting systems. Interpret federal and state regulations pertaining to municipal government accounting and grant funds. Manage multiple and competing priorities effectively. Supervise, train, and evaluate assigned staff. Utilize computer systems and software applications including automated financial/accounting management systems. Establish and maintain effective working relationships with those contacted in the performance of required duties. To make formal and informal presentations.~~

EDUCATION/EXPERIENCE MINIMUM QUALIFICATIONS

Any combination of education, experience and training equivalent to graduation from an accredited ~~four-year~~four-year college or university in a major that can be

CITY OF RICHMOND
SENIOR ACCOUNTANT
ACCOUNTING SUPERVISOR
PAGE 4

directly related to the knowledges and ability requirements, AND ~~three-four~~ years of professional related accounting experience with ~~one~~two years of lead or supervisory experience. Professional experience should ~~which would~~ demonstrate the application of the knowledge and abilities listed as minimum qualifications.

DRAFT

ORIGINAL

SENIOR ACCOUNTANT

DEFINITION

Under general direction, performs the difficult and complex work in accounting and related aspects of financial management; provides lead and technical direction to subordinate accountants and clerks and does other work as required.

CLASS CHARACTERISTICS

Incumbents of positions in this class are primarily responsible for the accounting, cost control and accounting systems functions. This is a working supervisor class; incumbents are required to work at the full journeyman level and provide lead direction to subordinate accountants and supervision to clerical personnel.

EXAMPLES OF DUTIES

1. Performs and reviews a variety of accounting activities including payroll, accounts payable, insurance administration, general and subsidiary ledger accounting, financial reporting, cashiering, records retention, contracts, claims, and internal-external auditing.
2. Provides lead direction and training to subordinate accountants; reviews performance of subordinates and submits recommendations to supervisor; supervises subordinates in such bookkeeping activities as record disbursements, expenses and tax payments and maintaining accounting controls.
3. Reviews and analyzes accounting methods and procedures; suggests changes in accounting procedures.
4. Prepares a variety of complex reports involving statistics, legal requirements, fund accounting and data processing.
5. Establishes and supervises the maintenance of capital improvement and other cost records.
6. Supervises and coordinates external and internal auditing; revises audit reports of agencies using funds under the City's control; makes recommendations concerning the various recording and reporting systems.

**CITY OF RICHMOND
SENIOR ACCOUNTANT
PAGE 2**

7. Answers requests of departments and agencies for information; follows up work assignments to see that deadlines are met; prepares correspondence.

MINIMUM QUALIFICATIONS

Thorough Knowledge of: accounting principles, practices and methods.

General Knowledge of: governmental fund accounting and budgeting; auditing techniques, principles and practices; modern office management and supervisory principles and practices.

Skill in: obtaining and analyzing complex accounting, fiscal, operating, functional and other data; preparing clear and comprehensive financial analyses and reports; understanding and applying pertinent rules, regulations and laws; devising and supervising the installation of accounting methods forms and procedures; establishing and maintaining effective work relationship with subordinates, associates and superiors; supervising and reviewing work of clerical accounting staff.

EDUCATION/EXPERIENCE

Any combination of education, experience and training equivalent to graduation from an accredited four year college or university in a major that can be directly related to the knowledges and ability requirements, AND three years of professional accounting experience which would demonstrate the application of the knowledge and abilities listed as minimum qualifications.