



## CIVIL SERVICE COMMISSION

**Monday – September 12, 2016**

Lori Walsh, Director of Human Resources  
Dawn McCollum, Commission Clerk

**CIVIL SERVICE COMMISSION**  
RICK WARD, *Chair*  
ANDRAE RANDOLPH, *Vice Chair*  
JOHN COSTA  
RON LE DOUX  
DON NELSON

### AGENDA

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Placer County is committed to ensuring that persons with disabilities are provided the resources to participate fully in its public meetings. If you are hearing impaired, we have listening devices available. If you require additional disability-related modifications or accommodations, including auxiliary aids or services, please contact the Executive Secretary. If requested, the agenda shall be provided in appropriate alternative formats to persons with disabilities. All requests must be in writing and must be received by the Executive Secretary five business days prior to the scheduled meeting for which you are requesting accommodation. Requests received after such time will be accommodated only if time permits.

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#### MEETING LOCATION:

#### Placer County Administrative Center – Tahoe City

775 North Lake Boulevard, Tahoe City CA 96145

530.581.6200

**2:00 PM**

#### OPEN SESSION

Roll Call

Flag Salute

- I. **Agenda Approval**
- II. **Approval of Minutes from previous meeting – August 8, 2016**
- III. **Public Comment:** Persons may address the Commission on items not on this agenda. Please limit comments to 3 minutes per person since the time allocated for Public Comment is 15 minutes. If all comments cannot be heard within the 15-minute time limit, the Public Comment period will be taken up at the end of the regular session. The Commission is not permitted to take any action on items addressed under Public Comment.
- IV. **New Business**
  - A. Request for approval of Work out of Class Pay pursuant to Placer County Code Section 3.08.510 (C)(5)(c.) for employees assigned to Health and Human Services Department.

- B. Request for approval of:
  - 1. Creation of the Civil Legal Secretary classification series and corresponding salary grades for four new classifications.
  - 2. Reclassification of three Legal Secretary Journey positions to Civil Legal Secretary II and the non-competitive promotion of the incumbents.
  - 3. Reclassification of two Legal Secretary Senior positions to Civil Legal Secretary – Senior and the non-competitive promotion of the incumbents.
  - 4. The abolishment of the classification of Secretary to County Counsel.

V. **COMMUNICATIONS** - Reports to the Commission are informational items only. **No action will be taken.**

- A. Provisional Appointments – None
- B. Staff Reports and Correspondence
  - Tahoe Recruitment and Retention Presentation
- C. Commissioner Comments

**CLOSED SESSION**

I. **PUBLIC EMPLOYEE PERFORMANCE EVALUATIONS**

- A. Evaluation of performance of various Placer County employees pursuant to Government Code Section 54957 and pursuant to Placer County Chapter 3 Code Section 3.04.650.

**OPEN SESSION**

- I. Report of action taken in closed session pursuant to Government Code Section 54957.
- II. Approval of merit increases for classified employees pursuant to Section 3.04.650 (progression in steps) of the Placer County Code.
- III. Adjournment

**Civil Service Commission – Upcoming Meeting**

- **Tuesday\*** - October 11, 2016 – Regular Meeting  
Auburn – Placer County Administrative Center (Board Chambers)

\*The October Meeting will be held on a Tuesday due to the October 10 County holiday.



PLACER COUNTY  
HUMAN RESOURCES DEPARTMENT  
145 Fulweiler Avenue, Suite 200  
Auburn, California 95603-4578

CIVIL SERVICE COMMISSION  
John Costa  
Ron Le Doux  
Don Nelson  
Andrae Randolph  
Rick Ward

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Lori Walsh, Human Resources Director  
Main Office: 530.889.4060  
FAX: 530.886.4626  
www.placer.ca.gov

## MEMORANDUM

**TO:** Civil Service Commission  
**FROM:** Lori Walsh, Human Resources Director  
**BY:** Dawn McCollum, Commission Clerk  
**DATE:** September 12, 2016  
**SUBJECT:** Work Out of Class Pay

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We have received the following requests for work-out-of-class pay extensions. Listed below are the departments, employee names, and time periods requested. The Human Resources Director has previously approved work-out-of-class pay and we are requesting the Civil Service Commission approve extensions as per Placer County Code 3.08.510 C.5.c. Supporting documentation has been attached to this memo.

| <u>Department</u>  | <u>Employee Name</u> | <u>Dates</u>            | <u>Approximately</u> |
|--------------------|----------------------|-------------------------|----------------------|
| HHS/Admin Services | Erica Collins        | 09/16/2016 – 03/17/2017 | 180 days             |
| HHS/ASOC           | Caroline Shaw        | 09/15/2016 – 03/17/2017 | 180 days             |

**Recommendation:** It is recommended that the Civil Service Commission approve the above work-out-of-class pay extension(s) in recognition of the duties being performed.

**cc:** Jeff Brown – Health & Human Services

**WORK OUT OF CLASS AGREEMENT  
DEPARTMENT OF HEALTH & HUMAN SERVICES**

**TO:** Lori Walsh, Personnel Director  
**FROM:** Jeff Brown, Director of Health & Human Services  
**DATE:** September 12, 2016  
**SUBJECT:** Request for Work Out of Class (WOC) Pay

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**ACTION REQUESTED**

Employee's Name: Erica Collins  
Current Classification: Accounting Technician  
WOC Classification: Staff Services Analyst I  
Initial WOC Effective Date: March 19, 2016 (FY 2015-16 PP 21)  
Requested Extension Effective Date: September 16, 2016 (PP 7)  
Approximate Number of Days: 180 days  
Approximate End Date (End of pp): March 17, 2017 (PP 20)  
Reason for WOC Request:

- Fill Behind Leave of Absence     Peak Workload/Special Project     Pending Reclassification/Reallocation  
 Fill Behind Retirement     No Request to Fill Vacancy     Request to CEO to Fill Vacancy  
 Fill Behind WOC     Temporary End WOC>80-Hours Leave     Restart WOC>80-Hours Leave

**BACKGROUND**

Ms. Collins continues to complete numerous special, and ongoing, projects that require focus and attention beyond the capacity of the existing team of Staff Services Analysts in Health & Human Services (HHS) Administration. These projects include working closely with the Director of Administration on realignment, the single largest revenue source for HHS programs. Ms. Collins successfully took a lead role on the project to roll-back the proposed monthly realignment spread and researched the HHS programs that are eligible to receive 1991 and 2011 realignment revenue. She continues to prepare reports for division monthly realignment meetings as well as being responsible to complete quarterly and annual realignment reports for the State of California. Ms. Collins role has expanded to function as the resource and point of contact to fiscal managers and accounting staff relative to realignment revenue. She is responsible to analyze HHS programs that are eligible to receive realignment, consider expenditures in these programs, and make recommendations to the Director of Administration to recognize realignment revenue, by program, at year-end and on a monthly basis. During the year-end process, Ms. Collins successfully mitigated any risk of over-recognizing revenue. Continuing responsibilities include working closely with the Revenue and Budget Manager and fiscal and accounting staff in Administrative Services to review monthly County IT charges to HHS. In addition to ensuring that all charges, including project management charges, are accurate, Ms. Collins will review, correct, or provide OCA/PCA coding within the tight one to two day timeline. Ms. Collins will also work across HHS divisions and with County IT managers and staff to facilitate communications across the two departments. She will work with the appropriate staff at County IT to ensure that APDs (Advanced Planning Document) are completed timely to maximize revenues. Ms. Collins will also continue to assist the Director of Administration with numerous other special projects as priority-based-budgeting structure requires changes to accommodate new software and as new programs, or program requirements, are implemented by the State. Ms. Collins will also assume responsibility to work closely with the Director of Administration to manage and oversee the HHS Administration budget. She has already taken responsibility to manage the training budget for HHS Administration. This work-out-of-class exception is expected to be resolved within this 180 days extension as HHS Administration has requested approval to overfill a vacant, funded position with a Staff Services Analyst I/II. Upon approval, the vacancy will be filled via the competitive process.

**RECOMMENDATION**

It is therefore recommended that Erica Collins, Accounting Technician, be approved to receive WOC pay as a Staff Services Analyst I effective September 16, 2016 (PP 8). This WOC assignment will result in an approximate increase of 5%. Consistent with the guidelines presented under provisions for work out of class section in Chapter 3 of the County code, additional compensation for working out of class shall be no less than a minimum of five percent or exceed a maximum of fifteen (15) percent. The specific amount of the additional compensation will be determined by an analysis of the employee's current classification and the proposed work out of class classification and in no case will exceed the amount the employee would receive if promoted.

**AUTHORITY**

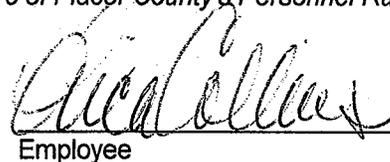
In line with the principle that an employee assigned to work in a position having discernibly higher job duties should receive higher pay, positions within the classified service may be applicable for work-out-of-class assignment. Individual employees maybe certified by the personnel department as being eligible for work-out-of-class pay when so assigned by the appointing authority or designate of that appointing authority. (3.08.510)

**PROVISIONS FOR WOC ASSIGNMENTS**

- For evaluation purposes, employee is rated on his or her current classification.
- Evaluation rating periods are not impacted by WOC assignments.
- Employee will continue to be eligible for merit increases as outlined in 3.04.650.
- Employee will continue to accrue seniority in his/her regular position/classification.
- Employee will continue to receive the benefit package associated with his/her regular position/classification.
- WOC compensation will not be considered or paid for assignments of two workdays or less or for training purposes.
- The Department must notify the Personnel Department when the WOC employee has a leave of absence that exceeds 10 ten working days since this results in ending WOC compensation. The Department must notify Personnel and submit the appropriate paperwork prior to continuing an employee in a WOC assignment upon his or her return from leave.
- Additional compensation for working out of class shall be no less than a minimum of five (5) percent or exceed a maximum of fifteen (15) percent.
- The Department is responsible for requesting WOC extensions anticipated to be beyond 180 days from the County Executive's Office using the Position Exception Form and process.
- Employee is not to begin the work out of class assignment until certified by the Personnel Department that the individual meets the minimum qualifications for the WOC assignment, the additional duties warrant WOC compensation, and that the WOC compensation requirements have been met.

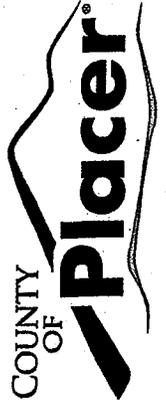
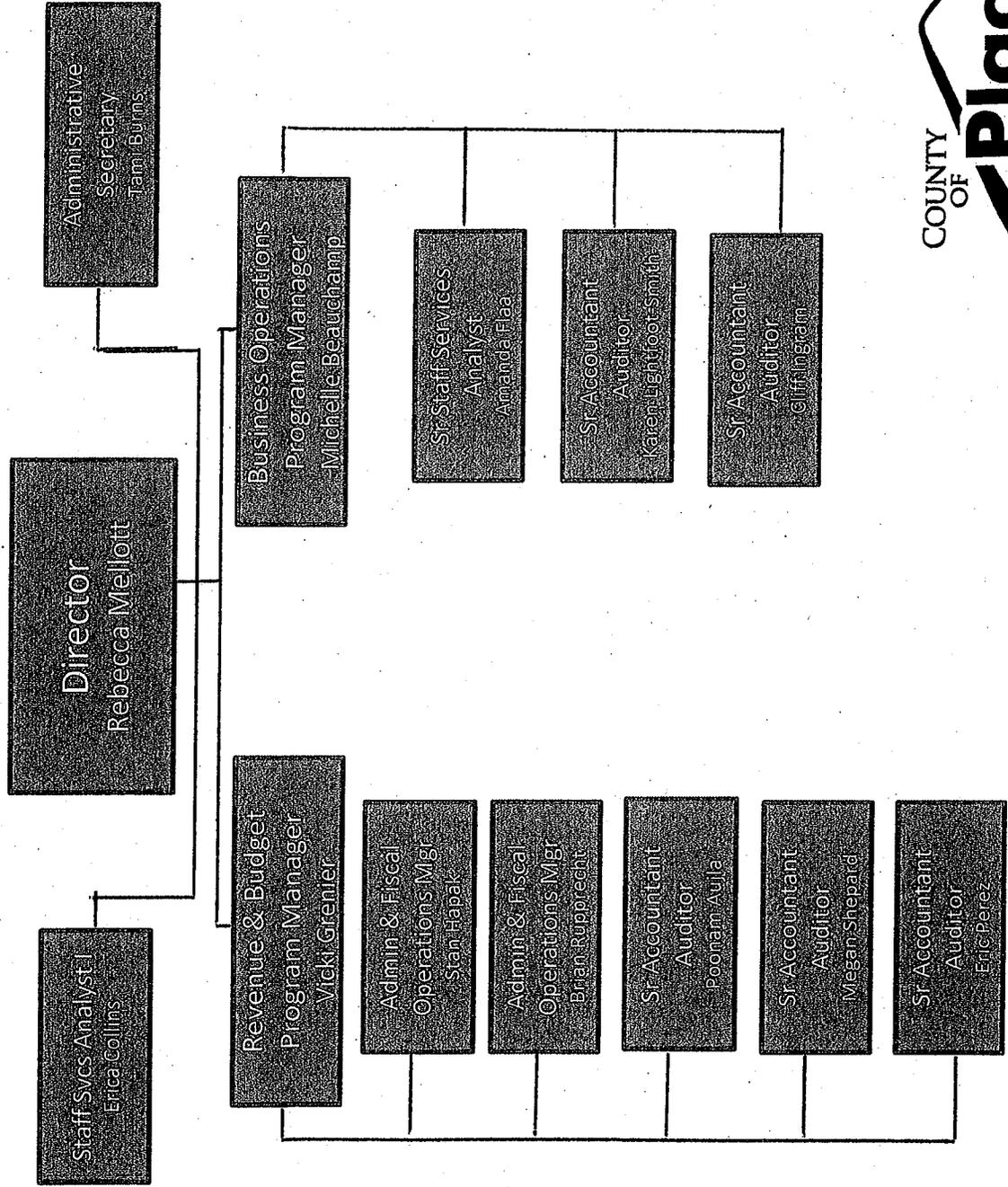
*I have reviewed and understand the Department and Employee responsibilities with the requested WOC assignment and understand the provisions set forth above and specified in 3.08.510 of Placer County's Personnel Rules.*

 8/15/2016  
 Appointing Authority Date  
 Jeffrey S. Brown  
 Director  
 Health and Human Services

 8/16/16  
 Employee Date  
 Erica Collins  
 Accounting Technician  
 Health and Human Services

 8/16/16  
 Supervisor Date  
 Rebecca Mellott  
 Director of Administration  
 Health and Human Services

**HHS ADMINISTRATIVE SERVICES**  
**REBECCA MELLOTT, DIRECTOR**



**WORK OUT OF CLASS AGREEMENT  
DEPARTMENT OF HEALTH AND HUMAN SERVICES**

**TO:** Lori Walsh, Human Resources Director  
**FROM:** Maureen F. Bauman, LCSW, MPA  
**DATE:** July 19, 2016  
**SUBJECT:** Request for Work Out of Class (WOC) Pay

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**ACTION REQUESTED**

Employee's Name: Caroline Shaw  
Current Classification: Administrative Clerk Journey  
WOC Classification: Administrative Clerk Senior  
Initial WOC Effective Date: March 19, 2016 PP 21  
Requested Extension Effective Date: September 15, 2016 PP 8  
Approximate Number of Days: 180 days  
Approximate End Date (End of pp): March 17, 2017 PP 20  
Reason for WOC Request: Current freeze on position

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Fill Behind Leave of Absence | <input type="checkbox"/> Peak Workload/Special Project         | <input type="checkbox"/> Pending Reclassification/Reallocation |
| <input type="checkbox"/> Fill Behind Retirement       | <input checked="" type="checkbox"/> No Request to Fill Vacancy | <input type="checkbox"/> Request to HR to Fill behind Vacancy  |
| <input type="checkbox"/> Fill Behind WOC              | <input type="checkbox"/> Temporary End WOC>80-Hours Leave      | <input type="checkbox"/> Restart WOC>80-Hours Leave            |

**BACKGROUND**

The Adult System of Care requests to continue a temporary Work out of Class assignment for an Administrative Clerk Senior to fill a critical role in the clerical department at Cirby Hills. This position was vacated March 21, 2016 as the employee was promoted to Administrative Supervisor. The person in this role performs a variety of functions necessary to improve care and access for Placer County clients, minimizing risk to the department, and lending support to providers and various team members. Multiple programs and teams within the division rely on the prompt and competent collaboration and support provided by this position. Some of the primary duties include: oversight of processing of volunteers, Network Access Request (NAR), employee moves, training coordinator, liaison between Facility Services, Telecommunications, and on-site contracted providers; support physicians' mileage request forms, take minutes at key internal and external meetings, issue and track keys, org chart updates, ASOC database updates, website upkeep; oversee three clerical in front reception area; support for two Cirby Hills program managers; back up assistance to support Administrative Supervisor.

Health and Human Services does not wish to fill this vacancy on a permanent basis at this time. Rather, it is the intent to hold a few clerical positions vacant as we transition our medical clinic services to Western Sierra and evaluate placement opportunities to existing staff. We anticipate this will happen over the next few months and no extension of this work out of class assignment should be necessary.

**RECOMMENDATION**

It is therefore recommended that Caroline Shaw, Administrative Clerk Journey, be approved to continue to receive WOC pay as an Administrative Clerk Senior effective September 15, 2016. This WOC assignment will result in an approximate increase of 5%. Consistent with the guidelines presented under provisions for work out of class section in Chapter 3 of the County code, additional compensation for working out of class shall be no less than a minimum of five percent or exceed a maximum of fifteen (15) percent. The specific amount of the additional compensation will be determined by an analysis of the employee's current classification and the proposed work out of class classification and in no case will exceed the amount the employee would receive if promoted.

**AUTHORITY**

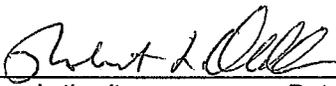
In line with the principle that an employee assigned to work in a position having discernibly higher job duties should receive higher pay, positions within the classified service may be applicable for work-out-of-class assignment. Individual

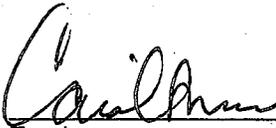
employees may be certified by the Human Resources Department as being eligible for work-out-of-class pay when so assigned by the appointing authority or designate of that appointing authority. (3.08.510)

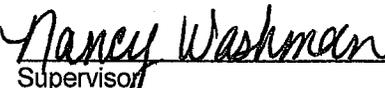
**PROVISIONS FOR WOC ASSIGNMENTS**

- For evaluation purposes, employee is rated on his or her current classification.
- Evaluation rating periods are not impacted by WOC assignments.
- Employee will continue to be eligible for merit increases as outlined in 3.04.650.
- Employee will continue to accrue seniority in his/her regular position/classification.
- Employee will continue to receive the benefit package associated with his/her regular position/classification.
- WOC compensation will not be considered or paid for assignments of two workdays or less or for training purposes.
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*I have reviewed and understand the Department and Employee responsibilities with the requested WOC assignment and understand the provisions set forth above and specified in 3.08.510 of Placer County's Personnel Rules.*

 7/26/16  
Appointing Authority Date  
Jeffrey S. Brown for Jeff Brown  
Director  
Health and Human Services

 7/29/16  
Employee Date  
Caroline Shaw  
Administrative Clerk Journey  
Adult System of Care

 7/29/16  
Supervisor Date  
Nancy Washman  
Administrative Supervisor  
Adult System of Care

# #359 POSITION ALLOCATION EXCEPTION REQUEST

TO: CEO Analyst: Joel Joyce  
 FROM Department: HHS/ASOC  
 Date: 7/19/16

Personnel Analyst: Jennifer Duvall  
 Department Contact: Maureen F. Bauman  
 Telephone Number: (530) 889-7256

Department Head Signature (required): [Signature] For Jeff Br...

Narrative Justification must be submitted with this form.

1. Action Requested ("x" applicable box)
- |   |                                    |
|---|------------------------------------|
| <input type="checkbox"/> BACKFILL                 | <input type="checkbox"/> OVERHIRE  |
| <input checked="" type="checkbox"/> WOC EXTENSION | <input type="checkbox"/> UNDERFILL |
| <input type="checkbox"/> OVERFILL                 |                                    |

**BACKFILL** - fill behind the incumbent of a budgeted position who is on a leave of absence, early retirement, or separating from the County, resulting in more than 1 FTE in the position.

**OVERFILL** - fill a position at a level above the approved allocation.

**OVERHIRE** - temporarily fill a position that does not exist in the allocation ordinance (Board approved).

**UNDERFILL** - fill at a level below the approved allocation.

RECEIVED  
 AUG 05 2016  
 Human Resources

2. Administrative Clerk Jrny Current Classification 32791 Allocation / Position Number  
 (can be found in ACORN)

3. Administrative Clerk Sr Requested Classification

4. Position funded in current budget: Yes Yes / No Number of months funded: 12  
 Funding sources / amounts: \_\_\_\_\_

5. Costs associated with this request - Use step 5 of the applicable annual salary grade (does not apply to backfill requests):

| Current                                 |                  |         |          |      |         |       | Workers<br>Comp | Total Current Salary and<br>Benefits   |
|---|------------------|---------|----------|------|---------|-------|-----------------|--|
| Classification                          | 401K &<br>Salary | Other   | PERS     | OPEB | FICA    |       |                 |  |
|   | \$ 42,460.00     | \$5,561 | \$9,749  |      | \$3,248 | \$400 | \$ 61,418       |  |
| Requested                               |                  |         |          |      |         |       | Workers<br>Comp | Total Requested Salary and<br>Benefits |
| Classification                          | 401K &<br>Salary | Other   | PERS     | OPEB | FICA    |       |                 |  |
|   | \$ 45,893.00     | \$5,562 | \$10,537 |      | \$3,511 | \$409 | \$ 65,912       |  |
| <b>Salary &amp; benefit difference:</b> |                  |         |          |      |         |       |                 | <u>\$ 4,494.00</u>                     |

CEO Analyst  
 Approved: Yes / No

Sign & Date: [Signature] 8-1-16

Personnel Analyst  
 Approved: Yes / No

Sign & Date: \_\_\_\_\_

County Executive Officer: [Signature]

8-1-16 JUL 27 2016

Form Logged Date: \_\_\_\_\_

By: \_\_\_\_\_

Number: \_\_\_\_\_

COUNTY  
 EXECUTIVE OFFICE

RECEIVED

## #359 Narrative Justification for Position Exception

### HHS ASOC - Administrative Clerk Senior

**1. Describe why this position exception is being requested.**

The Department has a freeze on many of its administrative positions pending implementation of the BOS decision relative to the County Medical Clinic. The BOS approved the change that would bring in a contracted provider to fully operate the medical clinics in Auburn. This BOS decision will impact the likely result in assignment changes with the department. It is anticipated that the Cirby Hills clinic will receive some of those positions including the possibility of an Administrative Clerk Senior. This temporary work-out-of-class assignment requires an extension while decisions are made to identify administrative staff to be reassigned to the Cirby Hills clinic. It is anticipated that these decisions will be made within the next three-four months.

**2. What duties will this position assume?**

This position will oversee or provide the following: processing of volunteers, Network Access Request (NAR), WEX, employee moves, training coordinator, liaison between Facility Services, Telecommunications, and on-site contracted providers; support physicians' mileage request forms, take minutes at key internal and external meetings, issue and track keys and pagers, Organizational Chart updates, ASOC database updates, website upkeep; oversee three clerical in front reception area; support for two Cirby Hills program managers; back up assistance to support Administrative Supervisor.

**3. How will the positions current duties be reassigned / distributed?**

If the exception to extend this WOC assignment is approved, then the staff person currently working in this role will be able to continue fulfilling the duties and responsibilities of the Administrative Clerk Senior position until the position is permanently filled.

**4. How many allocations do you have in the requested classification? How many of these positions are filled and funded?**

Six allocations; five filled; one vacant and funded in this classification.

**5. What alternatives did you consider in lieu of this position exception and why were they not selected?**

ASOC explored many different options available in the existing work force at the Cirby Hills and Auburn locations, and has determined that staffing this position is critical to the safe and efficient provision of services at the Cirby Hills clinic. Considerations have been made to explore the division of duties to other full-time or contracted staff relative to this position. Given the current increasing volume of clients requiring mental health clinic services, as well as the transition of clients returning from inpatient and crisis residential levels of care, a dedicated full-time qualified staff person is necessary to help the clinic accomplish its purposes.

**6. Fiscal Implications: If this position exception is approved, will there be sufficient funding to fully offset anticipated costs in the current fiscal year? Next fiscal year?**

Yes. The Senior Administrative Clerk position is funded for FY 2015-16 as well as FY 2016-17.

**7. What funding sources will fully fund this allocation exception?**

This position is funded through a combination of federal, state and county dollars.

**8. What is your plan and timeline for resolving this allocation exception? What vacant / funded position allocation do you plan to replace with this position exception?**

Once decisions have been made related to assignment changes of Medical Clinic staff to fill vacant positions at the Cirby Hills Clinic, this position will be filled permanently and this temporary work-out-of-class and position exception will end. It is anticipated that this process of re-locating Med Clinic staff to other locations within the next four months.

**9. If you do not get approval for the position exception, describe the anticipated impact to:**

**a. Program performance**

This position requires a special skill set to be able to manage multiple competing demands while working together with ASOC staff and staff from other divisions and departments. Staff productivity and customer service will significantly decrease if there is not a dedicated qualified person working in this position to be able to oversee the various on-going tasks and assignments. The care provided to mental health consumers will be impacted as staff will not have the senior clerical support needed to accomplish its purposes. Dividing these tasks among others will cause undue burden on staff resulting in burnout, low morale, and a negative impact to the clinic services provided by HHS ASOC.

**b. Revenue generation**

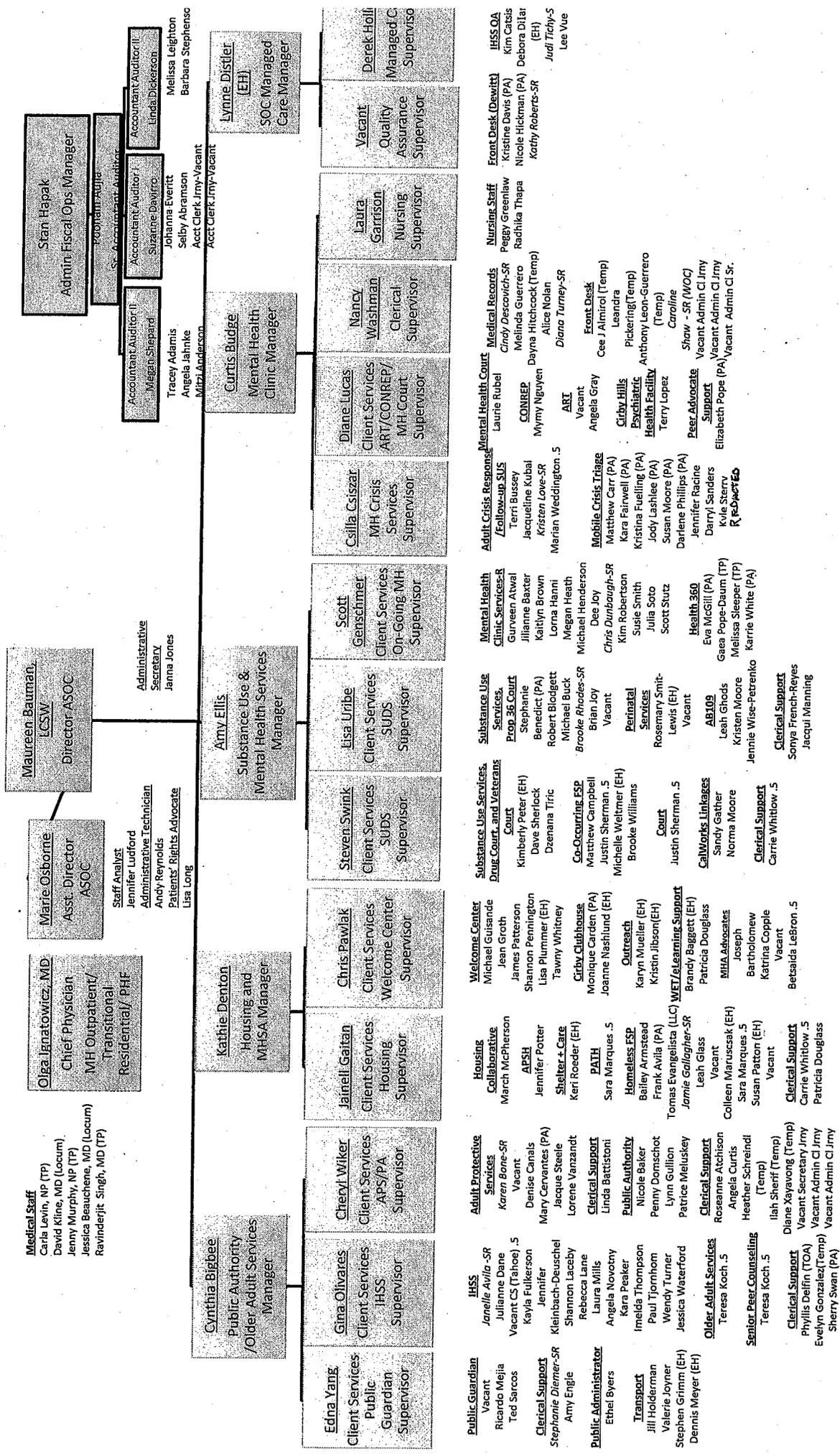
Negative impacts referenced above would decrease efficiencies and staff productivity in Medi-Cal billable services in addition to anticipated costs of staff turnover due to unreasonable workloads (should the position remain vacant and the duties be assigned to current staff).

**10. If overhire, please explain how your current overhire structure is working?**

NA

**CEO Comments:**

*\*Departments should attach an organizational chart highlighting the requested position exception.*



**Medical Staff**  
 Carla Levin, NP (TP)  
 David Kline, MD (Locum)  
 Jenny Murphy, NP (TP)  
 Jessica Beauchene, MD (Locum)  
 Ravinderjit Singh, MD (TP)

**Olga Ignatowicz, MD**  
 Chief Physician  
 MH Outpatient/  
 Residential/ PHP

**Marie Osborne**  
 Asst. Director  
 ASOC  
 Staff Analyst  
 Jennifer Ludford  
 Administrative Technician  
 Andy Reynolds  
 Patients' Rights Advocate  
 Lisa Long

**Maureen Bauman**  
 LCSW  
 Director ASOC  
 Administrative  
 Secretary  
 Janna Jones

**Stan Hapak**  
 Admin Fiscal Ops Manager  
 Sr. Accountant/Auditor  
 Accountant/Auditor II  
 Linda Dickerson  
 Accountant/Auditor  
 Sara Daxifiro  
 Johanna Everitt  
 Selby Abramson  
 Acct Clerk Jrmy-Vacant  
 Acct Clerk Jrmy-Vacant  
 Lynn Distler  
 (EH)  
 SOC Managed  
 Care Manager

**Accountant/Auditor II**  
 Megert Sheppard  
 Tracey Adams  
 Angela Jahrike  
 Mizzi Anderson

**Administrative Secretary**  
 Janna Jones

**Cynthia Bigbee**  
 Public Authority  
 /Older Adult Services  
 Manager

**Kathie Denton**  
 Housing and  
 MHSA Manager

**Amy Ellis**  
 Substance Use &  
 Mental Health Services  
 Manager

**Curtis Budge**  
 Mental Health  
 Clinic Manager

**Edna Yang**  
 Client Services  
 Public  
 Guardian  
 Supervisor

**Gina Olivares**  
 Client Services  
 IHSS  
 Supervisor

**Cheryl Wilker**  
 Client Services  
 APS/PA  
 Supervisor

**Jainell Gaitan**  
 Client Services  
 Housing  
 Supervisor

**Chris Pawlak**  
 Client Services  
 Welcome Center  
 Supervisor

**Steven Swink**  
 Client Services  
 SUDS  
 Supervisor

**Lisa Uribe**  
 Client Services  
 SUDS  
 Supervisor

**Scott Genschmer**  
 Client Services  
 On-Going MH  
 Supervisor

**Csilla Csizsar**  
 MH Crisis  
 Services  
 Supervisor

**Diane Lucas**  
 Client Services  
 ART/CONREP/  
 MH Court  
 Supervisor

**Nancy Washman**  
 Clinical  
 Supervisor

**Laura Garrison**  
 Nursing  
 Supervisor

**Vacant**  
 Quality  
 Assurance  
 Supervisor

**Public Guardian**  
 Vacant  
 Ricardo Mejia  
 Ted Sarcos

**Clerical Support**  
 Stephanie Diemer-SR  
 Amy Engle

**Public Administrator**  
 Ethel Byers

**Transport**  
 Jill Holderman  
 Valerie Joyner  
 Stephen Grimm (EH)  
 Dennis Meyer (EH)

**Older Adult Services**  
 Teresa Koch, S

**Senior Peer Counseling**  
 Teresa Koch, S

**Adult Protective Services**  
 Karen Bone-SR  
 Denise Canals  
 Mary Cervantes (PA)  
 Jacques Steele  
 Lorene Vanzandt  
 Linda Battistoni

**Homeless ESP**  
 Bailey Armstead  
 Frank Avila (PA)  
 Lynn Gullion  
 Patricia Meluskey

**Public Authority**  
 Nicole Baker  
 Penny Domschot  
 Lynn Gullion  
 Patricia Meluskey

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PLACER COUNTY  
HUMAN RESOURCES DEPARTMENT  
145 Fulweiler Avenue, Suite 200  
Auburn, California 95603-4578

CIVIL SERVICE COMMISSION  
John Costa  
Ron Le Doux  
Don Nelson  
Andrae Randolph  
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Lori Walsh, Human Resources Director  
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## MEMORANDUM

**To:** Civil Service Commission  
**From:** Lori Walsh, Human Resources Director  
**By:** Kathy Youngs, Human Resources Analyst II *KYoungs*  
**Date:** September 12, 2016  
**Subject:** Creation of Civil Legal Secretary Classification Series

---

### Recommendation

It is recommended the Civil Service Commission:

1. Approve the creation of the new Civil Legal Secretary classification series and corresponding salary grades for four new classifications:
  - Civil Legal Secretary I – Salary Grade GNRL 64 (\$3621.19 - \$4401.66/Monthly);
  - Civil Legal Secretary II – Salary Grade GNRL 76 (\$3992.44 - \$4852.90/Monthly);
  - Civil Legal Secretary – Senior – Salary Grade GNRL 88 (\$4401.66 - \$5350.28/Monthly);
  - Civil Legal Secretary – Supervising – Grade GNRL 100 (\$4852.90 - \$5898.78/Monthly)
2. Approve the reclassification of four (4) Legal Secretary Journey positions, Salary Grade GNRL 61 (\$3538.36 - \$4730.78/Monthly) to Civil Legal Secretary II – Salary Grade GNRL 76 (\$3992.44 - \$4852.90/Monthly) and the non-competitive promotion of three (3) incumbents pursuant to Chapter 3.08.480;
3. Approve the reclassification of two (2) Legal Secretary Senior positions, Salary Grade 73 (\$3900.94 - \$4741.64/Monthly) to Civil Legal Secretary – Senior, Salary Grade GNRL 88 (\$4401.66 - \$5350.28/Monthly) and the non-competitive promotion of the incumbents pursuant to Chapter 3.08.480.
4. Approve the abolishment of the classification of Secretary to County Counsel (CONF 336).

**Basis for Recommendation**

Bryce Consulting was retained by the Placer County Human Resources Department based on a request from the County Counsel's Office to review their six (6) positions currently allocated within the Legal Secretary classification series.

The County Counsel's Office performs litigation, which is normally contracted out by most agencies, with the exception of some of the larger counties. The impact litigation has on the secretary positions being studied was of concern with respect to whether the current classifications, as allocated and the classification specifications, as written, accurately reflect the level of work performed.

Position Inventory Questionnaires (PIQ's) were completed and submitted by the study participants, with review upon submission by the County Counsel, Chief Deputy County Counsel and Human Resources. Bryce Consulting reviewed the PIQ's and interviewed all staff who submitted a PIQ. The consultant also interviewed staff in the District Attorney's Office in an effort to determine the scope of responsibilities of the Legal Secretary positions allocated in the District Attorney's Office, when compared to the scope of work of the Legal Secretary positions allocated in the County Counsel's Office.

The classification analysis revealed that a new classification series of Civil Legal Secretary was necessary, as the current classifications do not accurately reflect the full scope or level of work required. Because the County conducts litigation in-house, the positions are also required to prepare and file a variety of legal documents in multiple courts. This requires the positions to perform minor legal research and read and interpret legal terminology so that they are able to take the information provided to them by the attorneys and properly format the legal documents according to each courts policies and procedures. Furthermore, the staff often drafts the legal document for the attorneys' review rather than the attorney drafting the document for formatting by staff. The complexity of the work is beyond the level of work outlined in the current class specification. Furthermore the experience requirements for the Legal Secretary have posed issues for the Department with the respect to hiring at the journey level. Because the more complicated work involves supporting litigation and the current requirements do not include such previous experience, the County has had limited candidate pools who truly possess experience that meets the needs of the Department.

At the completion of the classification study an internal salary review revealed that the new classification series of Civil Legal Secretary would need to be set at a salary grade appropriate to those classifications with a similar scope of work. Therefore, it is requested that the Civil Legal Secretary classification series is set at the appropriate salary grade, as listed above.

Note, there is currently one incumbent who does not meet the guidelines to be non-competitively promoted into the new classification, as provided by the rules of Chapter 3.08.480. Therefore, Human Resources will be conducting a recruitment to establish an eligible list (Chapter 3.08.720A) in order to appoint a qualified person into the newly reclassified position.

September 12, 2016

Creation of Civil Legal Secretary Classification Series

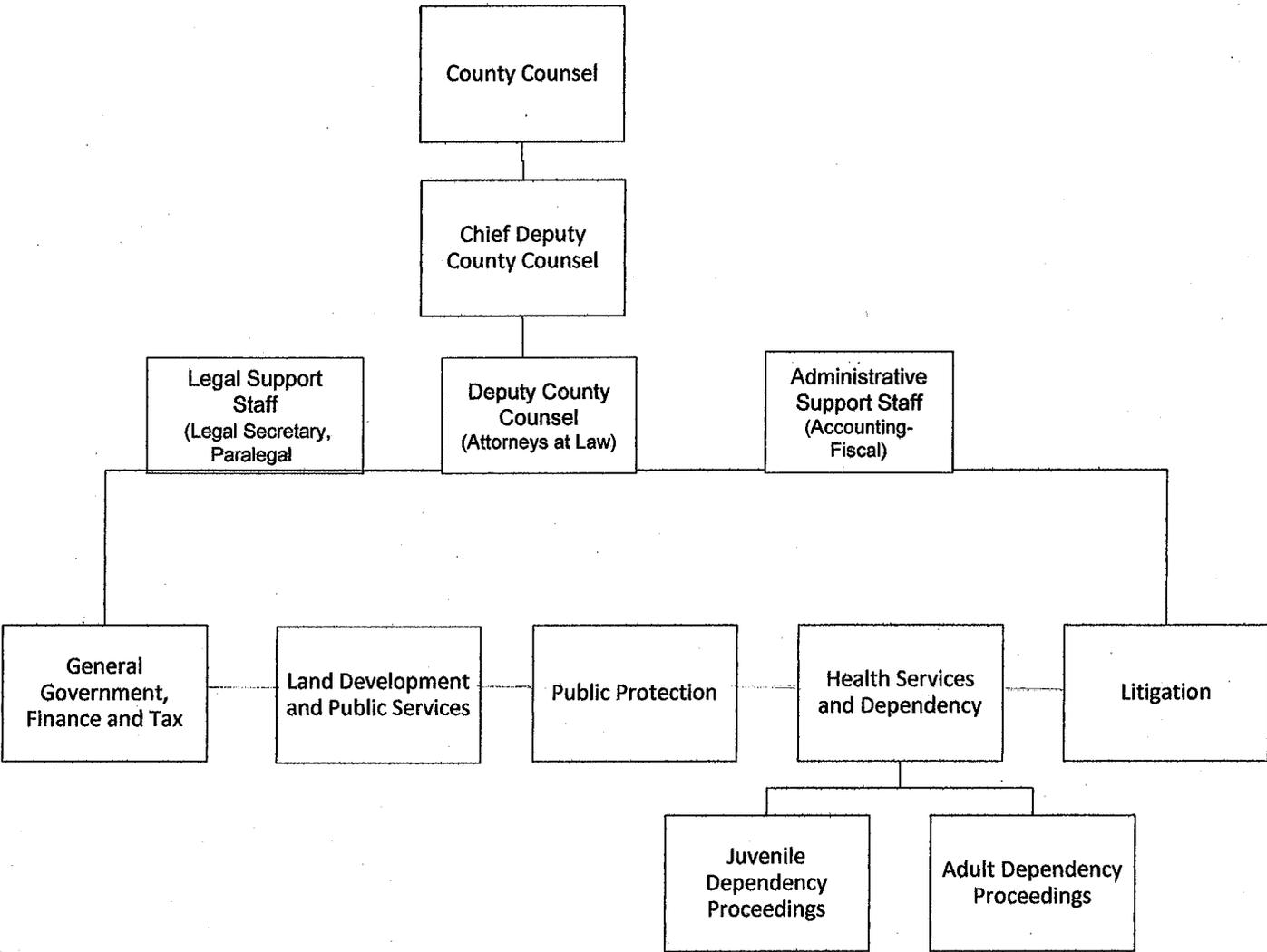
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Finally, it is requested that the Civil Service Commission abolish the classification of Secretary to County Counsel. This single position classification was created in March of 2002 based on the needs of the County Counsel's Office at that time. This classification has not been filled nor utilized for many years. The request to abolish this classification will further create symmetry within the County Counsel's Office operating within the new Civil Legal Secretary classification series.

Attached for the Commission's consideration is a copy of the proposed classification specifications and an organizational chart for the County Counsel's Office. The County Executive's Office has reviewed and concur with this information.

cc: Gerald Carden, County Counsel  
Val Flood, Chief Deputy County Counsel  
Joel Joyce, Management Analyst II

# County Counsel



BRYCE  
CONSULTING

PLACER COUNTY – COUNTY COUNSEL’S OFFICE  
CLASSIFICATION STUDY  
SEPTEMBER 2016

*prepared by:*

Bryce Consulting, Inc.  
3436 American River Drive, Suite 7A  
Sacramento, California 95864  
916-974-0199



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### **Appendix**

A – Classification Specifications

B – Position Allocation List

## **SECTION I - INTRODUCTION**

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Bryce Consulting was retained by Placer County to conduct a classification study involving six positions within the County Counsel's Office currently allocated to the Legal Secretary classification series. The County Counsel's Office within Placer County is somewhat unique in that the office performs litigation law which is normally contracted out, with the exception of some of the larger counties. The impact litigation law has on the study positions has been of concern with respect to whether the current classifications and class specifications accurately reflect the level of work performed. This report presents the classification study results and recommendations and includes:

|             |                                     |
|-------------|-------------------------------------|
| Section I   | Introduction                        |
| Section II  | Classification Conceptual Framework |
| Section III | Classification Plan Recommendations |

### **STUDY OBJECTIVES**

In conducting the study, Bryce Consulting had the following objectives:

- To systematically describe in the classification plan the kinds of work currently performed by employees and the level of responsibility and difficulty of that work.
- To recommend a classification structure that supports the organizational structure and includes a clear definition of terms.
- To recommend new or revised class specifications.
- To make allocation recommendations for each position based on the duties and responsibilities assigned.
- To allow for a review process that permits each employee to review the draft classification recommendation and to submit concerns directly to the consultant.

## STUDY METHODOLOGY

To achieve the above objectives, the following tasks occurred:

- The project consultant met with members of the Human Resources Department and the Chief Deputy County Counsel to initiate the project.
- The project consultant met with all available employees involved in the study to discuss the study objectives and procedures. At that time, Position Inventory Questionnaires (PIQs) were distributed to employees to complete regarding their current position.
- Upon independent completion of the questionnaire by the employees, management personnel reviewed the questionnaires for accuracy and provided additional comments. The consultant then conducted a preliminary analysis of the information provided by the employees and management.
- The consultant conducted interviews with 100% of the employees. The purpose of these interviews was to gain clarification and additional information regarding each position.
- The consultant spoke with representatives from the District Attorney's Office to collect information regarding duties and scope of responsibility since the Legal Secretary series is also used to support attorneys within the District Attorney's Office.
- Based on the information obtained through the questionnaires and interviews, the consultant analyzed and developed a recommended conceptual classification plan.
- Thereafter, the consultant drafted new class specifications that reflect the level of work and duties performed by the study positions which were reviewed by the Human Resources Department staff and Department management staff.
- Incumbents were provided an opportunity to review and comment on the recommendations and draft job descriptions for their position prior to finalization.
- Bryce developed a draft report of the findings and recommendations which was reviewed by the Human Resources Department prior to finalization.

## SECTION II - CONCEPTUAL FRAMEWORK

---

This section of the report presents a conceptual framework for the classification plan. The classification analysis, as applied to the study positions, used sound principles of job evaluation and job analysis.

The classifications represent a carefully designed classification structure tailored to the particular needs of the Department, as classification is a reflection of how an agency is organized. Within these job classes are positions that require a full range of knowledge, skills, and abilities to successfully accomplish a wide array of assignments. The class concepts as outlined on the following pages accommodate these diverse needs and requirements in a manner that encourages the highest degree of management flexibility possible. At the same time, these class concepts reflect organizational consistency within job series. This section elaborates upon these and other classification concepts used to build the proposed classification plan.

### CLASSIFICATION LEVELS

Position classification represents the grouping of jobs into a systematic classification structure based on the interrelationship of the duties performed, nature and level of responsibilities and other work-related requirements of the jobs. Within the overall classification plan for the study positions, it is possible to generally categorize each classification according to the following possible levels:

**Class Level**  
Entry (I)  
Journey (II)  
Advanced Journey (Senior)  
Supervisor

The following subsections generally define the responsibilities to be assumed at each class level identified.

**Entry** level classes provide on-the-job training to employees with no or limited related work experience. Assignments are generally limited in scope and are performed within a procedural framework established by higher level employees. As experience is acquired, the employee performs with less immediate supervision.

**Journey** level classes are designed to recognize those positions which require the incumbent to perform a broad range of tasks, usually under general supervision. A journey level position is fully trained in the scope of duties associated with this level.

**Advanced Journey** level classes possess a specialized technical or functional expertise. They typically are assigned significant responsibilities above the journey level, possess specialized knowledge, abilities, skills, and experience, and often exercise independent judgment in the performance of their duties. Advanced journey level classes typically provide technical, functional or lead supervision over lower level positions within a series.

The **Supervisor** level class recognizes full, first-line supervisory positions that plan, assign, and evaluate the work of subordinates and are responsible for a program area within a work unit or department.

### **ALLOCATION FACTORS**

Allocation factors are standards that are used to measure job requirements of individual positions. These factors can be compared in order to measure the similarities and differences among positions. The allocation factors used to develop the Classification Plan are:

**Decision Making**  
**Scope and Complexity**  
**Contact with Others Required by the Job**  
**Supervision Exercised and Received**  
**Knowledge, Skills and Abilities**

These criteria are briefly defined below:

#### **Decision Making**

This standard consists of (a) the decision making responsibility and degree of independence or latitude that is inherent in the position and (b) the impact of the decisions.

#### **Scope and Complexity**

This standard defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.

#### **Contact with Others Required by the Job**

This standard measures (a) the types of contacts and (b) the purpose of the contacts.

**Supervision Received and Exercised**

This standard describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position.

**Knowledge, Skills and Abilities**

This standard defines the knowledge, skills and abilities necessary to perform assigned responsibilities.

These allocation factors have been carefully and consistently applied during the analysis of each position included in the scope of the study. They are then compared with the same elements in positions that involve similar kinds of work. Not all factors will be as pertinent to all positions and each factor is analyzed in accordance with the importance of that particular factor to the kind of job under study. Consideration of these allocation factors leads to the identification of various classes. More specifically, positions are typically divided first into classification families and series that involve the same kind of work and then subdivided into classes based on levels of responsibility within each group. Positions are classified according to the nature and kind of duties assigned to the position. The assignment of additional duties of a similar nature to a position does not justify a higher classification. Redistributing work or adding employees, not reclassifying existing positions, properly solves problems of excessive workload.

## **SECTION III - CLASSIFICATION PLAN ALLOCATIONS**

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This section presents the classification plan and includes a proposed classification list and the allocation of positions to recommended classes.

### **CLASS LIST**

The proposed classification plan includes the following classes:

**Civil Legal Secretary I/II**  
**Senior Civil Legal Secretary**  
**Supervising Civil Legal Secretary**

### **CLASSIFICATION RECOMMENDATIONS**

Based on the duties performed, specifically as they relate to litigation support, it was determined that while the positions do perform the duties listed in the Legal Secretary class specification, the more complex work is not represented. Therefore a Civil Legal Secretary series is proposed. The newly proposed class specifications have been provided in **Appendix A**. **Appendix B** provides the allocation list.

### **RECOMMENDATIONS**

The Legal Secretary series consists of Legal Secretary – Entry, Legal Secretary - Journey, and Legal Secretary-Senior. The Legal Secretary – Entry and Journey are responsible for performing specialized, confidential and diversified legal secretarial work; assisting with scheduling and the handling of office details; and relieving legal staff of administrative details. According to the class specifications, positions type, edit and format legal documents including pleadings, briefs, opinions, orders, contracts, correspondence and other legal matters; handle routine departmental correspondence independently, and maintain files of correspondence, contracts, pleadings, discovery, legal opinions and other records and documents; assist other staff by performing duties related to special assignments or projects including researching and compiling information; provide information in person or over the telephone relative to departmental procedures, policies records, court rules and case files; collect information from a variety of sources pertinent to area of assignment; compile data as necessary and prepare routine reports as required; and schedule a variety of appointments as necessary.

Legal Secretary – Entry receives on-the-job training regarding County policies and procedures and then, upon successful completion of the probationary period and demonstrated ability to perform

the full scope of work, positions are typically non-competitively promoted to the Legal Secretary - Journey level after two years and once an incumbent shows a readiness to work at the higher level. Legal Secretary - Journey is the full journey level whereby incumbents are expected to perform the full scope of work independently. Legal Secretary - Senior is the lead level whereby incumbents perform the more complex duties and may provide technical and functional supervision over assigned personnel.

As previously stated, the positions do perform the duties listed in the Legal Secretary class specification; however, the current classification and class specification do not accurately reflect the full scope of work nor the level of work performed by the positions. Because the County conducts litigation in-house, the positions are also required to prepare and file a variety of legal documents in multiple courts. This requires the positions to perform minor legal research and read and interpret legal terminology so that they are able to take the information provided to them by the attorneys and properly format the legal documents according to each court's policies and procedures. Furthermore, the staff often drafts the legal document for the attorneys' review rather than the attorney drafting the document for formatting by staff. The complexity of the work is beyond the level of work outlined in the current class specification. Furthermore the experience requirements for the Legal Secretary have posed issues for the Department with respect to hiring at the journey level. Because the more complicated work involves supporting litigation and the current requirements do not include such previous experience, the County has had limited candidate pools who truly possess experience that meets the needs of the Department.

Based on the level of work and duties performed by the study positions, it is recommended that the County adopt the classifications of Civil Legal Secretary I, Civil Legal Secretary II and Senior Civil Legal Secretary. Additionally, the positions are currently supervised by an Administrative Services Officer which is not the most ideal supervisory relationship since the Administrative Services Officer does not require any type of legal experience. The current incumbent in the Administrative Services Officer classification happened to previously be a Legal Secretary but the chances of that occurring in the future are minimal. Therefore, in an effort to provide additional flexibility to the Department, the new classification of Supervising Civil Legal Secretary is also recommended; however, the classification will remain vacant.

In addition to the recommended classifications, the Department has an inactive classification of Secretary to County Counsel which has not been used in a number of years. Based on how the work is assigned, the Department does not foresee using the classification in the future and therefore, we recommend abolishing the classification.

With respect to salaries, it is recommended that the Civil Legal Secretary II be set at Grade 76 which is 2.5% below Paralegal II. The 2.5% differential is appropriate given that they perform similar duties; however, the Paralegal II requires certification that the Civil Legal Secretary II does not. It is recommended that Civil Legal Secretary I be set 10% below the II level at Grade 64 and that the Senior Civil Legal Secretary be set 10% above the II level at Grade 88. For the Supervising Civil Legal Secretary, it is recommended that the salary be set 10% above Senior Civil Legal Secretary at Grade 88.

**APPENDIX A**  
**CLASSIFICATION SPECIFICATIONS**

## **CIVIL LEGAL SECRETARY I - II**

### **DEFINITION**

To provide a variety of highly responsible and specialized secretarial, technical and administrative legal support duties related to litigation and transactional law, including drafting, formatting and filing a variety of legal documents in support of the County Counsel's Office.

### **DISTINGUISHING CHARACTERISTICS**

**Civil Legal Secretary I:** This is the entry level class in the Civil Legal Secretary series. This class is distinguished from the journey level by the performance of the more routine and less complex tasks and duties assigned to positions within the series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters allocated to the journey level. This class is typically used as a training class; employees may have only limited directly related work experience. Employees work under immediate supervision while learning to perform the full breadth of job tasks independently.

**Civil Legal Secretary II:** This is the full journey level class in the Civil Legal Secretary series. This class is distinguished from the Civil Legal Secretary I level by the assignment of the full range of duties including the more difficult and complex work. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the entry level.

This class is distinguished from the Senior Civil Legal Secretary in that the latter is responsible for performing the more sensitive duties and providing technical and/or functional supervision to others when assigned.

### **SUPERVISION RECEIVED AND EXERCISED**

#### **CIVIL LEGAL SECRETARY I**

Receives immediate supervision from assigned professional or management staff, receives technical and/or functional supervision from a Senior Civil Legal Secretary.

#### **CIVIL LEGAL SECRETARY II**

Receives general supervision from assigned professional or management staff, and may receive technical and/or functional supervision from a Senior Civil Legal Secretary.

**EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:**

Draft, format, proofread and finalize a variety of legal documents in support of assigned attorneys including, but not limited to, pleadings, briefs, writs, appellate briefs, motions, orders, civil discovery requests and responses, administrative records, warrants, judgments, agenda items and background materials, ordinances, resolutions, contracts, leases, and other civil litigation and legal transactional documents.

Assist attorneys with trial and hearing preparation; format and prepare exhibits list, witness list, and jury instructions; may support attorneys in court and administrative proceedings, as assigned. Perform a variety of duties in support of document management including receiving, scanning, organizing, filing, and destroying documents in paper and electronic files.

Perform routine and technical legal research, compile materials and prepare reports and documents.

Interpret, analyze, and determine compliance or acceptance of information and materials.

Establish and maintain systems related to assigned technical areas of responsibility; monitor area activities and report progress as required.

Review contracts and routine legal documents prepared by County departments for accuracy and completeness.

Draft, prepare and track civil subpoenas; research and locate contact information of involved parties; provide instructions for deposition officer and coordinate production of documents.

Arrange for the presence of witnesses and make deposition arrangements including coordinating with court reporter.

Receive and input Public Records Act requests and track timelines associated with such; assist in preparing responses; overseeing production of request.

Receive, input and track Board of Supervisor agenda items.

Recommend and assist in the implementation of goals and objectives; establish schedules and methods for office operations; implement office policies and procedures.

Monitor and control expenditures and process invoices; track a variety of operational statistics.

May be requested to assist with on-the-job training of newly hired staff regarding policies and procedures.

Perform a variety of responsible administrative support activities on behalf of attorneys and management including, but not limited to, scheduling and maintaining calendar of appointments, court hearings, and depositions on behalf of attorneys; making meeting arrangements; monitoring and following-up on due dates.

Serve as first point of contact at front desk, receiving, logging and distributing files, documents and Public Records Requests, answering phones, receiving, opening and processing incoming mail and greeting visitors.

Respond to complex inquiries and requests for information from the public and County staff.

Perform electronic and traditional filing in varied state and federal courts and administrative agencies.

Independently respond to letters and general correspondence of a routine nature.

Operate standard law office equipment including multi-line telephone, high volume printer, scanner, word processing and other document preparation applications; legal practice and case management software, other standalone computer software programs as related to assigned area.

Provide responsible technical assistance and training in areas of expertise to office co-workers and other County employees.

Organize evidence and documents for effective analysis and presentation by attorney.

Review and summarize deposition transcripts and other discovery responses.

Transcribe audio and video recordings

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **CIVIL LEGAL SECRETARY I**

#### **Knowledge of:**

- Principles and practices of legal secretarial and legal support including drafting, proofreading and filing a variety of legal documents in state court.
- Computer software, including word processing, data base and spreadsheet applications.
- English usage, spelling, punctuation and grammar; and arithmetic, basic mathematical calculations and statistics and statistical methods.
- Modern office procedures, methods and computer equipment.
- Principles and practices of report writing.
- Business letter writing.
- State court rules and procedures.

#### **Ability to:**

- On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; perform simple grasping and fine manipulation; lift light weight.
- Intermittently review documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve office issues for the public and with staff.
- Learn to perform legal research in carrying out technical administrative and legal support duties.
- Work with accuracy and thoroughness under stress.
- Compile and maintain records and prepare reports.
- Learn to analyze situations quickly and objectively to determine proper course of action.
- Use a personal computer and office equipment necessary for successful job performance.

- Type at a speed necessary for successful job performance.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Preserve confidentiality of sensitive material routinely encountered as part of work assignments.

### **Experience and Training**

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

#### **Experience:**

Two years of experience performing secretarial and technical legal support duties in a public or private legal office that included supporting civil litigation and transactional activities.

#### **Training:**

Equivalent to the completion of the twelfth grade preferably supplemented by course work in business, paralegal studies or a closely related field.

#### **License or Certificate:**

May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

## **CIVIL LEGAL SECRETARY II**

In addition to the qualifications of the Civil Legal Secretary I:

#### **Knowledge of:**

- Electronic filing of documents in the state and federal courts and with administrative agencies.
- Principles and practices of routine legal research.
- Federal and Appellate court rules and procedures, Administrative Agency regulations and procedures.
- Forms of agreements, leases, ordinances, resolutions, public record act responses, and administrative records.

**Ability to:**

- Perform independent legal research in carrying out technical administrative and legal support duties.
- Collect, compile, analyze and present a variety of data in a meaningful way.
- Understand and interpret complex policies, procedures and regulations.
- Compile and maintain complex and extensive records and prepare reports.
- Analyze situations quickly and objectively to determine proper course of action.
- Develop and recommend policies and procedures related to assigned office operations.

**Experience and Training**

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

**Experience:**

Two years of experience performing secretarial and technical legal support duties equivalent to a Civil Legal Secretary I in Placer County.

**Training:**

Equivalent to the completion of the twelfth grade preferably supplemented by course work in business, paralegal studies or a closely related field.

**License or Certificate:**

May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

## **SENIOR CIVIL LEGAL SECRETARY**

### **DEFINITION**

To perform the more difficult, complex and/or sensitive work related to the performance of highly responsible and specialized secretarial, technical and administrative legal support duties related to litigation and transactional law, including drafting, formatting and filing a variety of legal documents in support of the County Counsel's Office.

### **DISTINGUISHING CHARACTERISTICS**

This is the advanced journey level class in the Civil Legal Secretary series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity and sensitivity of duties assigned, independence of action taken, by the amount of time spent performing the duties and by the nature of the public contact made. Employees perform the most difficult and responsible types of duties assigned to classes within the series which may include providing technical and/or functional supervision to staff. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives direction from assigned professional or management staff.

Exercises technical and/or functional supervision over assigned staff.

### **EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:**

Provide direction, training and oversight to staff on policies, procedures, methods and format; serve as technical expert receiving and responding to staff questions.

Draft, format, proofread and finalize the more sensitive legal documents in support of assigned attorneys including, but not limited to, pleadings, briefs, writs, appellate briefs, motions, orders, civil discovery requests and responses, administrative records, warrants, judgments, agenda items and background materials, ordinances, resolutions, contracts, leases, and other civil litigation and legal transactional documents.

Participate in the revision, development and implementation of new office procedures.

Assist attorneys with trial and hearing preparation; format and prepare exhibits list, witness list, and jury instructions; may support attorneys in court and administrative proceedings, as assigned.

Perform a variety of duties in support of document management including receiving, scanning, organizing, filing, and destroying documents in paper and electronic files.

Perform routine and technical legal research, compile materials and prepare reports and documents.

Interpret, analyze, and determine compliance or acceptance of information and materials.

Establish and maintain systems related to assigned technical areas of responsibility; monitor area activities and report progress as required.

Review contracts and routine legal documents prepared by County departments for accuracy and completeness.

Draft, prepare and track civil subpoenas; research and locate contact information of involved parties; provide instructions for deposition officer and coordinate production of documents.

Arrange for the presence of witnesses and make deposition arrangements including coordinating with court reporter.

Receive and input Public Records Act requests and track timelines associated with such; assist in preparing responses; overseeing production of request.

Receive, input and track Board of Supervisor agenda items.

Recommend and assist in the implementation of goals and objectives; establish schedules and methods for office operations; implement office policies and procedures.

Monitor and control expenditures and process invoices; track a variety of operational statistics.

Perform a variety of responsible administrative support activities on behalf of attorneys and management including, but not limited to, scheduling and maintaining calendar of appointments, court hearings, and depositions on behalf of attorneys; making meeting arrangements; monitoring and following-up on due dates.

Serve as first point of contact at front desk, receiving, logging and distributing files, documents and Public Records Requests, answering phones, receiving, opening and processing incoming mail and greeting visitors.

Respond to complex inquiries and requests for information from the public and County staff.

Perform electronic and traditional filing in varied state and federal courts and administrative agencies.

Independently respond to letters and general correspondence of a routine nature.

Operate standard law office equipment including multi-line telephone, high volume printer, scanner, word processing and other document preparation applications; legal practice and case management software, other standalone computer software programs as related to assigned area.

Provide responsible technical assistance and training in areas of expertise to office co-workers and other County employees.

Organize evidence and documents for effective analysis and presentation by attorney.

Review and summarize deposition transcripts and other discovery responses.

Transcribe audio and video recordings

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

- Principles and practices of legal secretarial and legal support including drafting, proofreading and filing a variety of legal documents, including electronic filing in all courts and administrative agencies.

- Principles and practices of routine legal research.
- State, Federal and Appellate court rules and procedures, Administrative Agency regulations and procedures.
- Computer software, including word processing, data base and spreadsheet applications.
- English usage, spelling, punctuation and grammar; and arithmetic, basic mathematical calculations and statistics and statistical methods.
- Modern office procedures, methods and computer equipment.
- Principles and practices of report writing.
- Business letter writing.
- Forms of agreements, leases, ordinances, resolutions, public record act responses, and administrative records.

**Ability to:**

- Serve as technical and /or functional lead, providing training and oversight to staff on an ongoing basis or related to specific policies and procedures.
- On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; perform simple grasping and fine manipulation; lift light weight.
- Intermittently review documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve office issues for the public and with staff.
- Perform independent legal research in carrying out technical administrative and legal support duties.
- Collect, compile, analyze and present a variety of data in a meaningful way.
- Understand and interpret complex policies, procedures and regulations.
- Compile and maintain complex and extensive records and prepare reports.
- Analyze situations quickly and objectively to determine proper course of action.
- Develop and recommend policies and procedures related to assigned office operations.
- Work with accuracy and thoroughness under stress.
- Use a personal computer and office equipment necessary for successful job performance.
- Type at a speed necessary for successful job performance.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Work with various cultural and ethnic groups in a tactful and effective manner.

- Preserve confidentiality of sensitive material routinely encountered as part of work assignments.

**Experience and Training**

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

**Experience and Training**

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

**Experience:**

Two years of experience performing secretarial and technical legal support duties equivalent to a Civil Legal Secretary II in Placer County.

**Training:**

Equivalent to the completion of the twelfth grade preferably supplemented by course work in business, paralegal studies or a closely related field.

**License or Certificate:**

May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

## **SUPERVISING CIVIL LEGAL SECRETARY**

### **DEFINITION**

To plan, organize, direct and supervise staff involved in the performance of highly responsible and specialized secretarial, technical and administrative legal support duties related to litigation and transactional law within the County Counsel's Office; and to perform a variety of technical tasks relative to assigned area of responsibility.

### **DISTINGUISHING CHARACTERISTICS**

The Supervisor level recognizes positions that perform full, first-line supervisory responsibilities including planning, assigning and evaluating the work of subordinates and are responsible for a program area within a work unit or department.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from an assigned manager.

Exercises direct supervision over assigned secretarial personnel.

### **EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:**

Recommend and assist in the implementation of unit goals and objectives; establish schedules and methods related to supporting attorneys within the County Counsel's Office; implement policies and procedures.

Plan, prioritize, assign, supervise and review the work of staff involved in the performance of secretarial, technical and administrative legal support including drafting, formatting and filing a variety of legal documents.

Evaluate operations and activities of assigned responsibilities; recommend improvements and modifications; prepare various reports on operations and activities.

Participate in budget preparation and administration; prepare cost estimates for budget recommendations; monitor and control expenditures.

Participate in the selection of staff; provide or coordinate staff training; conduct performance evaluations; recommend discipline; implement discipline procedures as directed.

Participate in the revision, development and implementation of new office procedures.

Assist attorneys with trial and hearing preparation; format and prepare exhibits list, witness list, and jury instructions; may support attorneys in court and administrative proceedings, as assigned.

Perform a variety of duties in support of document management including receiving, scanning, organizing, filing, and destroying documents in paper and electronic files.

Interpret, analyze, and determine compliance or acceptance of information and materials.

Perform the most difficult and complex work in the drafting, formatting, proofreading and finalizing the more sensitive legal documents in support of assigned attorneys including, but not limited to, pleadings, briefs, writs, appellate briefs, motions, orders, civil discovery requests and responses, administrative records, warrants, judgments, agenda items and background materials, ordinances, resolutions, contracts, leases, and other civil litigation and legal transactional documents.

Respond to complex inquiries and requests for information from the public and County staff.

Answer questions and provide information to the public; investigate complaints and recommend corrective action as necessary to resolve complaints.

Participate in special projects and/or assignments in an effort to improve processes, procedures and workflow.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

- Principles and practices of legal secretarial and technical support related to the drafting, proofreading and filing a variety of legal documents, including electronic filing in all courts and administrative agencies.
- Principles of supervision, training and performance evaluations.
- Principles of budget monitoring.
- Principles and practices of routine legal research.
- State, Federal and Appellate court rules and procedures, Administrative Agency regulations and procedures.
- Forms of agreements, leases, ordinances, resolutions, public record act responses, and administrative records.
- Modern office procedures, methods and computer e equipment.
- Principles and practices of leadership, motivation, team building and conflict resolution.
- Principles and practices of work safety.
- Pertinent local, State and Federal laws, ordinances and rules relative to child support activities.
- English usage, spelling, punctuation and grammar; and arithmetic, basic mathematical calculations and statistics and statistical methods.
- Business letter writing.
- Methods for training employees in work procedures.
- Advanced principles and practices of customer service.

### **Ability to:**

- Organize, implement and direct assigned litigation and transactional law administrative and secretarial support operations/activities.
- Continuously, review legal documents related to litigation and transactional law; identify necessary information needed per legal requirements; problem solve issues related to the drafting, formatting, and filing of legal documents in a variety of courts; understand and

interpret Department policies and procedures; explain operations to less experienced staff.

- On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; kneel or twist to retrieve files; write or use keyboard to communicate through written means; lift light weight.
- Supervise, train and evaluate assigned staff.
- Collect, compile, analyze and present a variety of data in a meaningful way.
- Understand and interpret complex policies, procedures and regulations.
- Compile and maintain complex and extensive records and prepare reports.
- Analyze situations quickly and objectively to determine proper course of action.
- Develop and recommend policies and procedures related to assigned office operations.
- Interpret and explain pertinent County and Department policies and procedures.
- Use a personal computer and office equipment necessary for successful job performance.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Preserve confidentiality of sensitive material routinely encountered as part of work assignments.
- Type at a speed necessary for successful job performance.
- Exercise problem-solving with sound independent judgment.
- Assist in the development and monitoring of an assigned program budget.
- Develop and recommend policies and procedures related to assigned operations.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Communicate clearly and concisely, both orally and in writing.

### **Experience and Training**

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

#### **Experience:**

Four years performing secretarial and technical legal support duties that included supporting civil litigation and transactional activities including one year performing duties similar to a Senior Civil Legal Secretary.

#### **Training:**

Equivalent to the completion of the twelfth grade preferably supplemented by course work in business, paralegal studies or a closely related field.

#### **License or Certificate:**

May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

## SECRETARY TO COUNTY COUNSEL

### DEFINITION

To perform responsible and confidential administrative and secretarial assistance of a legal nature for the County Counsel; to provide administrative support to assigned projects or programs; and may provide technical and functional supervision over assigned personnel.

### SUPERVISION RECEIVED AND EXERCISED

Receives direction from the County Counsel.

Exercises technical and functional supervision over assigned legal secretarial and clerical personnel.

### EXAMPLES OF ESSENTIAL DUTIES – Essential duties may include, but are not limited to, the following:

- Perform a wide variety of executive secretarial and administrative duties as required by daily operations in the County Counsel's office.
- Represent the County to the public, businesses, Board members and other agencies at the request of the County Counsel.
- Coordinate office activities and schedules; develop and recommend office procedures and systems; ensure smooth office operations.
- Plan, prioritize, assign, supervise and review the work of staff.
- Participate in the selection of staff; provide or coordinate staff training; work with employees to correct deficiencies; recommend disciplinary action and implement discipline as directed.
- Provide legal secretarial and technical assistance to County Counsel; perform routine legal research and conduct analysis of a wide range of legal documents.
- Prepare Board of Supervisors agenda items.
- Assist in formulating office policy, goals and procedures; collect and compile relevant data supporting recommendations.
- Review contracts for accuracy and completeness of signatures, dates and exhibits.
- Research and analyze routine administrative projects for the County Counsel and Board of Supervisors; prepare first draft reports on routine administrative matters.
- Identify reports and correspondence requiring priority attention of the County Counsel.
- Provide follow up to assignments given management staff by the County Counsel; provide status reports to the County Counsel.
- Receive telephone calls including complaints, and provide assistance to callers using judgement as to calls requiring priority attention.
- Independently respond to letters and general correspondence of a routine nature.
- Make travel arrangements for the County Counsel; maintain appointment schedules and calendars; arrange meetings and conferences.
- Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

- Perform related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

- Organization, procedures and operating details of a County Counsel's office.
- English usage, spelling, grammar, and punctuation.
- Modern office methods, procedures and computer equipment.
- Pertinent County functions, policies, rules and regulations.
- Principles and methods of business letter and report writing.
- Principles and practices of a law office.
- Principles and practices of legal filings.
- Applicable federal, state and local laws regulations.
- Legal terminology.
- Principles and practices of legal secretarial work.
- Basic statistics and analytical techniques.
- Principles and practices of supervising and evaluating performance.

### **Ability to:**

- On a continuous basis, sit at desk for long periods of time. Intermittently twist and reach office equipment; write or use keyboard to communicate through written means; occasionally run errands; may lift light weight.
- Intermittently review documents related to department operations; observe, identify and problem solve office, and procedures; understand, interpret and explain department and county policies and procedures; explain and problem solve office issues for the public and with staff.
- Prioritize and coordinate tasks and events in a highly sensitive environment.
- Employ good judgement and make sound decisions in accordance with established procedures and policies.
- Interpret and explain pertinent laws and rules.
- Understand, organize, index and reference a wide variety of administrative information and records.
- Analyze situations, recommend solutions, and develop effective courses of action.
- Communicate clearly and concisely, both orally and in writing.

## PLACER COUNTY

### Secretary to County Counsel (Page 3)

- Independently perform a variety of complex legal secretarial and administrative tasks.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Type accurately at a speed of 50 words per minute.
- Review and analyze legal documents and perform routine legal research.
- Research and draft simple legal documents.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Perform administrative detail work including preparing clear and concise reports.
- Assign work, supervise, train legal secretarial and clerical personnel and evaluate assigned staff.

#### **Experience and Training**

- Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

##### **Experience:**

Five years of increasingly responsible legal secretarial experience including administrative support work for management personnel.

##### **Training:**

Equivalent of the completion of the twelfth grade preferably supplemented by legal secretarial/office management or general business college course work.

**APPENDIX B**  
**POSITION ALLOCATION LIST**

COUNTY COUNSEL'S OFFICE  
Allocation Listing

| INCUMBENT NAME    | CURRENT CLASSIFICATION    | CLASS CONCEPT    | CLASS RECOMMENDATION                |
|-------------------|---------------------------|------------------|-------------------------------------|
| Bird, Katina      | Legal Secretary - Journey | Journey          | Civil Legal Secretary II            |
| Brown, Elizabeth  | Legal Secretary - Journey | Journey          | Civil Legal Secretary II            |
| Havens, Delene    | Legal Secretary - Journey | Journey          | Civil Legal Secretary II            |
| Porter, Jenna     | Legal Secretary - Journey | Journey          | Civil Legal Secretary II            |
|                   |                           |                  |                                     |
| Lovejoy, Jeanette | Legal Secretary - Senior  | Advanced Journey | Civil Legal Secretary - Senior      |
| Padilla, Teri     | Legal Secretary - Senior  | Advanced Journey | Civil Legal Secretary - Senior      |
|                   |                           |                  |                                     |
| New               | NA                        | Supervisor       | Civil Legal Secretary - Supervising |



# MEMORANDUM

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**DATE:** September 12, 2016  
**TO:** Civil Service Commission  
**FROM:** Lori Walsh, Human Resources Director  
**SUBJECT:** Review of Merit Increases for Eligible Classified County Employees

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During the closed session of your meeting, your Commission will review the performance evaluations of classified County employees pursuant to Government Code Section 54957. For those classified County employees determined to be eligible for a merit increase, the following motion is submitted for your consideration:

Motion to approve the classified merit awards set forth in the list dated September 12, 2016, pursuant to Section 3.04.650 of the County Code.