



Midpeninsula Regional
Open Space District

R-15-134
Meeting 15-23
September 9, 2015

AGENDA ITEM 5

AGENDA ITEM

Addition of Two New Classifications and the Reclassification of Three District Positions in the Natural Resources Department and One District Position in the Administrative Services Department.

GENERAL MANAGER'S RECOMMENDATION

1. Adopt a resolution amending the District's Classification and Compensation Plan as follows:
 - a. Addition of Resource Management Specialist III classification;
 - b. Addition of Senior Finance and Accounting Technician classification;
 - c. Removal of Senior Accounting Technician classification, to be replaced by Senior Finance and Accounting Technician classification.
2. Approve the following reclassifications of positions:
 - a. Reclassification of a Planner III to a Senior Resource Management Specialist in the Natural Resources Department;
 - b. Reclassification of a Planner II to a Resource Management Specialist III in the Natural Resources Department;
 - c. Reclassification of Senior Administrative Assistant to a Senior Finance and Accounting Technician in the Natural Resources Department.
 - d. Reclassification of Senior Accounting Technician to a Senior Finance and Accounting Technician in the Administrative Services Department.

SUMMARY

The Midpeninsula Regional Open Space District's (District) Natural Resources Department was created in 2012 by moving positions from the Operations Department and the Planning Department into this new department. With the Board of Director's adoption of a new Strategic Plan in September 2011, and a heightened emphasis on restoration of open space as a major focus of the District's mission, creation of the Natural Resources Department with responsibility to develop and implement resource management policies was critical. With the successful completion of the Vision Plan and the passage of Measure AA in 2014, followed by the

completion of the Financial and Operational Sustainability Model (FOSM) Study in early 2015 to guide organizational change to be able to efficiently and effectively deliver Measure AA capital projects, it was an opportune time to evaluate the classifications in the Natural Resources Department to ensure the department and classifications are appropriately structured and defined for their complex and varied workloads. Therefore, at the beginning of FOSM implementation, the General Manager directed a reclassification study of the Natural Resources Department, to be conducted by Management Partners as part of their FOSM Implementation agreement with the District, approved by the Board on February 25, 2015. The results of Management Partners' reclassification study, and review and modifications by the Human Resources Division and the General Manager's Office, identified the need to create two new classifications and reclassify three existing positions to support the work of this department. In addition, there is the need to change the position title only, with no job duty changes, of one classification in the Administrative Services Department. These reclassification recommendations are not approvals for new staff, but rather changes for existing staff. Should these changes be approved by the Board of Directors, the effective date of these changes will be September 14, 2015.

DISCUSSION

Study Process

The General Manager has the delegated authority to direct classification studies as needed. At the General Manager's request, Management Partners conducted a compensation and classification study of the Natural Resources Department to evaluate whether changes in the department were necessary. The Consultant's process included:

- Meeting with the Assistant General Manager, Human Resources Supervisor and Natural Resources Manager to review positions to be studied; discuss study parameters; identify background and other resources used to complete the review.
- Development, distribution and subsequent review of the Position Description Questionnaires (PDQ) that were completed by the employees in the selected classifications and reviewed by the employees' Department Manager.
- Review of additional background information, including materials from the District Compensation Study of 2014 conducted by Koff & Associates and job descriptions from the District's 14 comparator agencies.
- Analysis of the classification information gathered.
- Development of draft findings and recommendations for management review.
- Additional contacts and interviews with incumbents and management as necessary to obtain details and gain clarification on classification duties.
- Preparation of a report to management with conclusions and recommendations on classifications and compensation.

Following review of the Consultant's recommendations, Human Resources and the General Manager's Office conducted additional evaluation and employee interviews to develop the General Manager's final recommendations.

Natural Resources Department Evolution

The Natural Resources Department was formally established as a department as of April 1, 2012. At that time the District's land acreage was continuing to increase and several large restoration projects were underway, including Mount Umunhum Remediation and Demolition, Mindego Gateway, and El Corte de Madera Creek Staging area and trail. The District established the new Natural Resources Department with the following core functions:

- A. Plan, implement and design projects to protect and restore the natural resources;
- B. Comply with the California Environmental Quality Act (CEQA) and resource agency regulation requirements;
- C. Work with other entities to obtain funding, plan for and protect District and regional natural resources;
- D. Steward District working landscapes to protect natural resources values and provide sustainable agriculture uses.

The department was formed with eight positions: three Planner positions transferred from the Planning Department and five Resource Management Specialists from the Operations Department.

The Natural Resources Department's workload and complexity of projects and responsibilities has continued to evolve since the Department's inception in 2012, particularly with Measure AA projects implementation. Additionally, recommendations of the FOSM Study, which the Board accepted on May 27, 2015, include important organizational structure changes as the District pursues effective and efficient implementation of Measure AA projects. Based on these drivers, the General Manager recommends the following reclassification recommendations for Natural Resources positions.

Reclassification Study Recommendations

1. Creation of Resource Management Specialist III Classification:

The Natural Resources department was originally formed with staff from the Planning and Operations departments and as a result the position titles and class specifications of Natural Resources do not accurately reflect the level of knowledge, skills, ability and experience associated with each position. Therefore the General Manager's recommendation is to create a Resource Management Specialist III classification, and remove the Planner II and III classifications from Natural Resources, to complete the Natural Resources series as follows:

- Natural Resources Manager
- Senior Resource Management Specialist
- Resource Management Specialist III
- Resource Management Specialist I-II

The addition of the Resource Management Specialist III classification creates a clearly defined career ladder and adds stability in the staffing structure of the Natural Resources

Department. This is important for future growth and staffing of this department and the District.

Creation of Senior Finance and Accounting Technician Classification and removal of Senior Accounting Technician Classification:

The Natural Resources Department staff includes a Senior Administrative Assistant. This position also supports the Real Property Department. The primary role of this position is now required to be more budget and finance focused to support budgeting, accounting, and related data management needs of the Natural Resources and Real Property Departments. These job duties are similar to those of the current Senior Accounting Technician in the Administrative Services Department. One has a budgeting emphasis, while the other has an accounting emphasis, but they each are required to do some of both. Therefore, the General Manager's recommendation is to create one senior technician classification, called the Senior Finance and Accounting Technician, that captures the general finance and budgeting, as well as accounting, knowledge, skills, and abilities required in these roles. The recommendation to reclassify the Senior Administrative Assistant to a Senior Finance and Accounting Technician comes as the result of a thorough review and analysis of the current work and skill level needed to accomplish the responsibilities of this position (see #5 below). The current Senior Accounting Technician's title will be changed to Senior Finance and Accounting Technician.

2. Reclassification of Planner III to Senior Resource Management Specialist

The incumbent was transferred into the Planner III position in the Natural Resources Department in April 2012. This individual provides high level resource planning expertise for all aspects of complex natural resource management projects, restoration projects, and external projects such as the Lehigh Quarry; supports and coordinates with other departments by providing natural resources expertise; and coordinates with resource agencies and educational institutions regarding complex outside projects such as the Permanente Quarry EIR, lawsuit technical support, and timber harvest reviews, as well as cultural resources, fisheries, and sensitive aquatic species. The incumbent provides technical natural resources expertise related to new purchases and to assist planning projects, and advises as the technical expert on natural resource issues. In addition to the technical aspect of the job, the incumbent is also involved in budget development and in tracking and payment for complex restoration and remediation projects including the air quality study at Rancho San Antonio and consultant studies for geology, geotechnical, biotic and cultural resources. The position requires an educational background in natural/cultural resources and experience with natural resource issues and projects. The incumbent has supervised the current Planner II position in Natural Resources for several years.

Although the duties of this position overlap to some degree with those described in the Planner series job descriptions, the specialized knowledge and expertise in natural resources management is the paramount function of the position. The duties and responsibilities as well as the educational background and experience needed for the position align much more closely with the Resource Management Specialist series classification than with the Planner series classification.

If approved by the Board, the new Resource Management Specialist series will consist of a flexibly staffed Resource Management Specialist I/II, a Resource Management Specialist III, and a Senior Resource Management Specialist. The scope and responsibilities of the incumbent exceed those of the Resource Management Specialist III position in that the

incumbent is responsible for highly technical and complex programs and projects requiring specialized education, while also responsible for supervising other staff. After a thorough review of the Senior Resource Management Specialist job specification and an analysis of the workload for the incumbent, it is clear that the skills, abilities and knowledge required for this position exceed that of a Planner III/Resource Management Specialist III. The incumbent in this position currently performs all the essential job functions of the Senior Resource Management Specialist. Therefore, it is appropriate to add a Senior Resource Management Specialist to the Department as the demands of the position have evolved to require a higher skill level and wider range and scope of responsibilities, oversee highly technical and high profile programs and projects as well as providing supervision and guidance to staff.

3. *Reclassification of Planner II to Resource Management Specialist III*

The incumbent was transferred into the Planner II position in Natural Resources in April 2012. Although this individual is a Planner II, she was confirmed to be functioning at the Planner III level and has been receiving out-of-class pay as a Planner III as of March 2015. The incumbent provides Natural Resources expertise, permitting, planning, and coordination for both District-wide and site specific programs, policies, planning documents, studies, and projects with special emphasis on regulatory compliance regarding special status species including oversight and coordination of all surveying, monitoring, reporting, mapping, project design and implementation. The incumbent also oversees biological monitoring and protection during planning, design and implementation of District projects and provides training, technical expertise and hands on opportunities for staff, volunteers, docents and the public regarding Natural Resources issues. The educational background required for the position is an undergraduate degree in biological, botanical, cultural, geologic or other sciences related fields. Documented hours or certification working with protected species under multiple biological experts at multiple sites is required to obtain regulatory permits to oversee the District's work with protected species.

Although the duties of this position overlap to some degree with those described in the Planner series job descriptions, the specialized knowledge and expertise in natural resources management is the paramount function of the position. The duties and responsibilities as well as the educational background and experience needed for the position clearly align much more closely with the Resource Management Specialist series classification than with the Planner series classification.

If approved by the Board, the new Resource Management Specialist series will consist of a flexibly staffed Resource Management Specialist I/II, a Resource Management Specialist III, and a Senior Resource Management Specialist. The scope and responsibilities of the incumbent exceed those of the Resource Management Specialist II position in that the incumbent is responsible for more technical programs and projects requiring specialized education and is required to possess certification to oversee the District's work with protected species. However, the Resource Management Specialist III does not reach the level of Senior Resource Management Specialist as the latter requires a higher level of experience, independence, and oversees more complex projects, while also responsible for full supervision of professional, technical, and administrative support staff. In that this position exceeds the scope of the II level but does not reach the scope of the senior level, it is appropriate to reclassify the incumbent to a Resource Management Specialist III, with

responsibility for highly technical programs and projects and for providing technical oversight and guidance to staff.

4. *Reclassification of Senior Administrative Assistant to Senior Finance and Accounting Technician and Renaming Senior Accounting Technician to Senior Finance and Accounting Technician*

Over the last five years, the District has experienced an evolution of its accounting, finance and budgeting functions. Additionally, the passage of Measure AA creates a clear need for a higher level of expertise and oversight to support the accounting, finance and budgeting functions. The incumbent in the Senior Administrative Assistant position was hired in the Natural Resources Department in July 2013. The findings of the classification study affirmed that the incumbent performs the full range of professional accounting duties as described in the current class description as well as duties that reflect a greater role in tracking, analyzing and reporting on capital expenses and other data for the annual budget process. For example, the incumbent is responsible for supporting department managers by tracking their budget in the financial system and reporting variances, assisting with budget preparation, and tracking budget for the year and reconciling it with the budget performance report.

The incumbent is responsible for the day-to-day finance and budget tracking of the Natural Resources and Real Property departments, prepares budget reports detailing project budgets and balances using various analysis tools such as business analytics to track and report expenditures for capital projects that will be funded through the passage of Measure AA (General Obligation Bond) and other Non-Measure AA projects.

The incumbent spends approximately 45% of her time on budget related duties and the remaining 55% split between accounting and administrative support duties. The budgetary duties exceed the scope of the Senior Administrative Assistant classification, but are not at the level of the Management Analyst I-II classification. The current position more closely aligns with the level of the Senior Accounting Technician classification in the Finance Department. However, while the Senior Accounting Technician classification focuses primarily on accounting functions, it is appropriate to create a new classification that captures both skill sets of accounting and budgeting duties. It is recommended that a Senior Finance and Accounting Technician classification be created which defines the full range of knowledge, skills and responsibilities of the incumbent in Natural Resources and the current Senior Accounting Technician and allows for flexibility to meet staffing needs in the future.

Salary Range Recommendations

Management Partners conducted a compensation study of the current Natural Resources Department classifications with a look at the 14 comparator agencies established in the compensation study conducted by Koff & Associates in 2014. In keeping with past practices and the Employee Compensation Guiding Principles Policy approved by the Board in March of 2015, the study focused on the top step median salaries of each classification. The new recommended salary ranges, shown in the table below, reflect slight to moderate increases to the Natural Resources positions salaries overall. The increases are 2.5-5% to the classifications with the exception of the change from Planner II to Resource Management Specialist III which represents

a 21.5% range change. However, the Planner II position is currently working out-of-class as a Planner III at range 39, therefore this reclassification is not a range change for the incumbent.

Current classification	range	salary	Recommended Classification	range	salary	% of range change
Senior Resource Management Specialist	42	\$94,812-118,404	Senior Resource Management Specialist	43	\$97,188-121,380	2.5% increase
Planner III	39	\$88,152-\$110,076	Senior Resource Management Specialist	43	\$97,188-121,380	5% increase
Planner II	31	\$72,528-\$90,564	Resource Management Specialist III	39	\$88,152-\$110,076	21.5% increase
Resource Management Specialist II	33	\$76,140-\$95,100	Resource Management Specialist II	34	\$78,000-\$97,416	2.4% increase
Resource Management Specialist I	29	\$69,072-\$86,244	Resource Management Specialist I	30	\$70,764-\$88,356	2.45% increase
Senior Administrative Assistant	24	\$61,116-\$76,332	Senior Finance and Accounting Technician	26	\$64,176-\$80,148	5% increase
Senior Accounting Technician	26	\$64,176-\$80,148	Senior Finance and Accounting Technician	26	\$64,176-\$80,148	No Change

BOARD COMMITTEE REVIEW

This report was not previously reviewed by a Committee.

FISCAL IMPACT

If approved, the reclassifications would take effect September 14, 2015 and result in an additional \$17,000 in salaries and benefits costs this fiscal year. Vacancy savings in the Natural Resources Department are available to cover this cost increase and future full year salary costs will be incorporated into the FY2016-17 budget.

PUBLIC NOTICE

Notice was provided pursuant to the Brown Act. No additional notice is necessary.

CEQA COMPLIANCE

No compliance is required as this action is not a project under the California Environmental Quality Act (CEQA).

NEXT STEP

If approved the reclassifications would take effect September 14, 2015, which is the first day of the pay period following the September 9, 2015 Board meeting.

Attachments:

1. Resolution amending the classification & compensation plan, including new classifications specifications and revised Classification and Compensation Plan
2. Natural Resources Department Organizational Chart

Responsible Manager:

Kevin Woodhouse, Assistant General Manager

Prepared by:

Candice Basnight, Human Resources Supervisor

RESOLUTION NO. 15-__

RESOLUTION OF THE BOARD OF DIRECTORS OF THE MIDPENINSULA REGIONAL OPEN SPACE DISTRICT AMENDING THE CLASSIFICATION & COMPENSATION PLAN BY ADDING NEW CLASSIFICATIONS SPECIFICATIONS

WHEREAS, the General Manager has proposed an amendment to the Midpeninsula Regional Open Space District Classification and Compensation Plan to add the new job classifications of Resource Management Specialist III and Senior Finance and Accounting Technician, remove the existing job classification Senior Accounting Technician, and to add the classification specifications and salary ranges therefore; and

WHEREAS, the Board of Directors having considered such proposals and recommendations;

NOW, THEREFORE, the Board of Directors of Midpeninsula Regional Open Space District does hereby resolve as follows:

1. The Classification and Compensation Plan of the Midpeninsula Regional Open Space District shall be amended by adding the new job classification title of Resource Management Specialist III, classification specifications and salary range to read as set forth in the attached exhibits hereto.
2. The Classification and Compensation Plan of the Midpeninsula Regional Open Space District shall be amended by adding the new job classification title Senior Finance and Accounting Technician, replacing the existing job classification title Senior Accounting Technician, classification specifications and salary range to read as set forth in the attached exhibits hereto.
3. Except as herein modified, the Classification and Compensation Plan, Resolution No. 15-18 as amended, shall remain in full force and effect.
4. This resolution shall be effective September 14, 2015.

PASSED AND ADOPTED by the Board of Directors of the Midpeninsula Regional Open Space District on _____, 2015, at a regular meeting thereof, by the following vote:

* * * * *

AYES:

NOES:

ABSTAIN:

ABSENT:

ATTEST:

APPROVED:

Secretary
Board of Directors

President
Board of Directors

APPROVED AS TO FORM:

General Counsel

I, the District Clerk of the Midpeninsula Regional Open Space District, hereby certify that the above is a true and correct copy of a resolution duly adopted by the Board of Directors of the Midpeninsula Regional Open Space District by the above vote at a meeting thereof duly held and called on the above day.

District Clerk



Midpeninsula Regional Open Space District

RESOURCE MANAGEMENT SPECIALIST III

DEFINITION

Under general direction, performs complex professional level duties, including designing and implementing capital improvement and natural resource preservation and protection projects, and preparing land use and management plans for new and existing open space preserves; assists in the development and review of land use policies; coordinates natural resources efforts among other District staff and outside consultants, contractors and regulatory agencies; provides professional advice and assistance to other District staff, organizations, governmental and regulatory agencies, and the public on site planning, development, environmental review, and resource management; performs a variety of studies and prepares and presents staff reports; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned management and/or supervisory staff. Exercises direct supervision over assigned staff, interns, and/or volunteers.

CLASS CHARACTERISTICS

This is the fully experienced-level class in the professional resource management specialist series. Incumbents are expected to perform the full range of professional and technical natural resources management work in all of the following areas: capital improvement, open space, land use, and natural resource protection activities, and daily departmental operations, in addition to providing project management and administration. Positions at this level are distinguished from the Resource Management II level by conducting more complex projects, working independently and exercising greater judgment and initiative, and providing direct supervision to lower-level staff. Positions 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 of the work unit. This class is distinguished from the Senior Management Resource Specialist in that the latter is the highest-level class in the professional resource management specialist series and is responsible for organizing, assigning, and reviewing the work of departmental and/or contract staff involved in a major area of the Natural Resources Department, in addition to performing the more complex natural resources and project management activities.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

For all assignments:

- Manages, directs, and participates in highly complex and specialized planning projects and activities in the areas of watershed protection, project specific plan updates and amendments, and other projects as assigned; designs and conducts studies to develop policies, plans, and codes; conducts field inspections of assigned natural resources and development projects to ensure compliance with Federal, State, and local laws, rules, and regulations, including the California Environmental Quality Act (CEQA), design specifications, and local guidelines and procedures.

- Develops and standardizes procedures and methods to improve the efficiency and effectiveness of assigned services, projects, and activities; identifies opportunities for improvement and recommends to District management staff.
- Coordinates the work of an assigned functional area, including capital improvement and long-range planning, land acquisition, use, and management studies, historical and natural resource preservation, and other specialized studies as assigned.
- Participates in the preparation of project implementation budgets, and monitors project expense budgets and approves/processes project expenditures.
- Researches and compiles information for the preparation of resource management plans for District preserves; conducts or directs field or background research; meets with field staff, District personnel, members of the public, and neighbors to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.
- Evaluates initial studies, mitigated negative declarations, environmental impact reports, and other CEQA documents; uses the evaluation to formulate a recommendation on projects; monitors project compliance with environmental document mitigation measures and conditions of approval.
- Conducts and supervises natural resource studies in the community; gathers data for implementing or evaluating natural resource projects; makes recommendations.
- Provides input to operations and other District staff regarding policy documents that affect District wide programs and projects.
- Serves as source of information for developers, engineers, property owners, and contractors regarding resource impacts of land use applications and general municipal planning programs, projects, and functions; represents the department and District to outside agencies, public and private groups, and the general public; facilitates community participation through a continual dialogue with residents and project partners on major projects.
- Develops consultant requests for proposal, advertising, and bid processes for professional and/or construction services; evaluates proposals and recommends project award; administers contracts after award.
- Negotiates, administers, and manages contracts for services; reviews documents, reports, and other work products prepared by consultants and provides feedback and corrections; reviews and oversees consultant invoices and progress payments.
- Oversees and administers various grants related to the area of assignment; prepares grant applications; prepares and submits invoices for grant reimbursement.
- Develops land acquisition strategies and terms for complex acquisition projects; negotiates resource issues with property owners.
- Prepares and presents staff reports for resource management projects, contract solicitation and authorization, permits and licenses and grant proposals.
- Provides highly complex staff assistance to assigned management and supervisory staff; develops and reviews staff reports related to assigned activities, projects, and services; under direction, presents reports to and advises the Natural Resources Manager, General Manager, Board of Directors, and other commissions, committees, and boards related to a wide variety of natural resources management matters.
- Represents the District to outside agencies; conducts presentations regarding District resource management issues.
- Prepares and coordinates the preparation of written materials and graphics required for assigned projects; assumes responsibility for drafting and assembling plans for projects.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in natural resources; researches emerging products and techniques and their applicability to District needs.
- Monitors changes in regulations and technology that may affect operations; implements policy and procedural changes after approval.
- Receives, investigates, and responds to problems and complaints in a professional manner; identifies and reports findings and takes necessary corrective action.

- Performs work, including research and the gathering of scientific information, focused on the protection and restoration of natural, historical, and cultural resources on District properties, as well as the containment and elimination of hazardous waste.
- Develops and maintains resource inventories of District lands; oversee the collection of field-based data by staff and consultants, including the GIS data related to the distribution, abundance and habitat conditions for natural resources.
- Assists in the analysis of environmental impacts of projects and recreational use on District lands and assists in the development and implementation of resource management restoration plans for specific areas and preserves. Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Project and program management principles and practices, including goal setting, work plan development, implementation, and evaluation.
- Applicable Federal, State, and local laws, codes, and regulations concerning the operation of the assigned function.
- Modern principles and practices, technical and legal issues of cultural and historical planning, environmental planning and program management, biology, geology, earth sciences, ecology, wildlife, and vegetation management.
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- Basic principles and practices of budget development and administration.
- Basic principles and practices of employee supervision, including work planning, assignment, and the training of staff in work procedures.
- Principles and practices of contract negotiation and administration.
- Practices of researching resource management issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective staff reports.
- Recent developments, current literature, and sources of information related to natural resource management and environmental review.
- Modern office methods, practices, procedures, and equipment, including computer hardware and software necessary for graphic presentation, mapping, and database management.
- Principles of advanced mathematics and their application to resource management work.
- Methods and techniques of effective technical report preparation and presentation.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, various business, professional, educational and regulatory organizations, and with property owners, developers, contractors, and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors and District staff.

Ability to:

- Administer complex, technical, and sensitive resource management and related programs in an independent and cooperative manner.
- Recommend and implement goals, objectives, and practices for providing effective and efficient services.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Interpret and explain natural resource projects and programs to the general public; identify and respond to issues and concerns of the public, District staff, Board of Directors, and other boards and commissions.

- Assess, monitor, and report environmental impact on and of various District programs and services.
- Conduct complex research projects, evaluate alternatives, and make sound recommendations.
- Read, interpret, apply, and explain technical written material and complex Federal, State, and local policies, procedures, laws, regulations, ordinances, and District resource management policies and procedures.
- Effectively represent the department and the District in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations and individuals.
- Coordinate assigned activities with other District departments and agencies as required.
- Direct the work of contract consultants.
- Prepare and present clear, concise, and logical written and oral reports, correspondence, policies, procedures, and other written materials.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Read and understand technical drawings and specifications.
- Perform mathematical and statistical computations with precision.
- Make sound, independent decisions within established policy and procedural guidelines.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

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

Equivalent to graduation from an accredited four-year college or university with major coursework in environmental design, natural resource management, ecology, biology, geology or a related field, and three (3) years of increasingly responsible experience in natural resource management preferably in parks, open space, or related field, including at least one (1) year of supervisory and administrative responsibility. A Master's Degree is desirable.

Licenses and Certifications:

- Possession of a valid California Driver's License.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, to inspect District development sites, including traversing uneven terrain, climbing ladders, stairs, and other temporary or construction access points; to operate a motor vehicle, and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is partially a sedentary office and partially a field classification and standing in and walking between work areas and development sites is required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects weighing up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may work in the field and occasionally be exposed to loud noise levels, cold and hot temperatures, inclement weather conditions, or road hazards. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

EFFECTIVE: September 2015

REVISED:

FLSA: Exempt



Midpeninsula Regional Open Space District

SENIOR FINANCE AND ACCOUNTING TECHNICIAN

DEFINITION

Under general supervision, performs a variety of financial, accounting and budgeting work, as well as difficult and complex technical duties in preparation, maintenance and processing of accounting and budgeting records and transactions, including reconciling general ledger accounts, setting up and maintaining chart of accounts, accounts payable, accounts receivable, and payroll; maintains District financial accounts and records and assists in audits and the preparation of financial statements, reports and analyses; provides responsible technical accounting and budgeting support to professional staff in assigned department; assists in preparation of the department budget; provides office administrative and clerical support of assigned management, professional, and supervisory staff, including planning, organizing, and overseeing the operations and functions of the assigned function; coordinates assigned programs, projects, and services with other District departments, divisions, and outside and performs related work as required

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned supervisory and managerial staff. Exercises no direct supervision over staff. May provide technical and functional direction to assigned administrative support staff or temporary staff.

CLASS CHARACTERISTICS

This is the advanced journey-level in the technical accounting class series. Incumbents are cross-trained to perform the full range of technical work in all of the following areas: general accounting and auditing, accounts payable, accounts receivable, payroll, and related areas, in addition to performing a variety of record keeping, reconciliation, and accounting support activities. Incumbents perform the most difficult and complex types of duties assigned to the class series, exercising a high level of independent judgment and initiative. Incumbents perform a wide variety of specialized technical and administrative support work for management, professional, and supervisory staff. Incumbents are required to be fully trained in all procedures related to the assigned functional area. Responsibilities require the frequent use of tact, discretion, and independent judgment as well as knowledge of departmental and District activities. The work requires the interpretation and application of policies, procedures, and regulations, as well as performing various research and budgetary support functions. This class is distinguished from the Accountant in that the latter is a professional level requiring completion of a four-year degree and is responsible for organizing and overseeing day-to-day activities and operations of the accounting and payroll operations and programs. May focus on accounting or budgeting duties or a combination of duties in both functions.

EXAMPLES OF ESSENTIAL FUNCTIONS *(Illustrative Only)*

Management reserves the right to add, modifies, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

Examples of Accounting function:

- Assists in the preparation of journal entries and reconciles general ledger and subsidiary accounts related to postings from payroll, accounts payable, and accounts receivable; assists in preparing monthly financial statements, including distributing monthly revenue and expenditure reports to departments; assists in gathering data and preparing monthly financial and statistical reports.
- Reconciles expenditure and revenue accounts, including land acquisition worksheets, capital assets, and long-term debt funds; verifies availability of funds and classification of expenditures; researches transactions to resolve problems; processes appropriation transfer requests between accounts; reconciles bank statements to the general ledger; prepares graphs and schedules as needed.
- Sets up and maintains chart of accounts.
- Provides technical assistance to the Accountant in preparation of the year -end audit; ensures availability and accuracy of required reports and documentation; sends out notifications to appropriate parties.
- Assists in preparing a wide variety of financial reports and statements.
- Assists in processing debt service obligations, including creating payment schedule, paying annual obligations, posting interest on bonds and notes from statements, updating liability balance, and posting journal entries.

Examples of Budgeting function:

- Responsible for the day-to-day finance and budget tracking for assigned departments.
- Prepares budget reports detailing project budgets and balances. Prepares journal entries and maintains the general ledger and subsidiary ledger.
- Assists in the performance of year-end review of accounts.
- Assists in the preparation of adjusting and closing entries and preparation of year-end financial statements.
- Assists in the preparation of the assigned department's mid-year and year end budget review.
- Collects and compiles material for review and analysis; provides recommendations for changes in programs, policies, or procedures to improve efficiency and cost effectiveness of operations.
- Coordinates and participates in the preparation of department budget; monitors budget expenditures and revenues; initiates department purchases for office supplies and other items as assigned.
- Performs other financial and accounting related duties, including receiving payments and reconciling them with purchasing orders, tracking vendor and invoice information, assisting with bid requests, price quotes, purchase and expenditure requests, and purchase orders.

Additional Essential Functions may include:

- Relieves district staff of a variety of administrative details by assisting with duties of an advanced, complex, and sensitive nature; plans, organizes, and carries out administrative assignments and special projects, including assisting with budget preparation, planning, and implementation; recommending organizational or procedural changes affecting support activities; recommending improvements in work flow, procedures, and use of equipment and forms.
- Assists in a variety of department and program operations; coordinates, oversees, monitors, and participates in special projects, assignments, staff and/or community events, and activities as assigned; maintains control files on matters in progress and expedites their completion; serves on committees as assigned.
- Organizes and carries out administrative assignments; researches, compiles, and organizes information and data from various sources on a variety of specialized topics related to programs in

- assigned area; checks and tabulates standard mathematical or statistical data; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
- Develops, composes, types, edits, and proofreads a variety of complex documents, including forms, memos, administrative, statistical, financial, and staff reports, and correspondence for department Manager and staff from rough draft, dictation equipment, handwritten copy, verbal instructions, or from other material; inputs and retrieves data and text using a computer terminal; checks draft documents for punctuation, spelling, and grammar; makes or suggests corrections to drafts.
 - Verifies and reviews forms and reports for completeness and conformance with established regulations and procedures; applies departmental and program policies and procedures in determining completeness of applications, records, and files.
 - Designs and implements file, index, tracking, and record-keeping systems.
 - Prepares and processes reports, forms, and records, such as District Board agenda items, requests for proposals, bid packages, contracts and agreements, reimbursement requests, and organizational charts.
 - Coordinates and integrates department services and activities with other agencies and District departments.
 - May serve as administrative support to a board, commission, or special task force; provides a variety of support to District boards, committees, and task forces, including coordinating and scheduling meetings, appointments, and speaking engagements; reserving meeting rooms; maintaining reports; compiling and distributing agenda packets; attending meetings; formatting and distributing minutes; and following-up on decisions as required.
 - May train assigned subordinates to ensure office work flow is maintained and office goals are met; assigns work according to changes in workload priorities; evaluates office and administrative functions to recommend changes in office procedures; may evaluate the work of staff.
 - Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Basic principles, practices, and methods of public and governmental accounting and financing, including general accounting, payroll, auditing, and reporting functions and their application to District operations.
- Terminology and practices of financial and account document processing and record keeping, including accounts receivable, accounts payable, and payroll.
- Principles and procedures of record keeping, and bookkeeping, reporting and basic governmental accounting principles and practices
- Business arithmetic and financial and statistical techniques.
- Computerized accounting and finance systems and computer software and systems related to accounting and payroll processes.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility, including the District's Memoranda of Agreement and related contracts and documents.
- Modern office practices, methods, computer equipment, and computer applications related to work, including word processing and spreadsheet applications.
- Practices and methods of office management and administration, including the use of standard office equipment.
- Basic policies and practices relate to governmental budgeting.
- Principles and practices of data collection and report preparation.

- Organization and function of public agencies, including the role of an elected District Board and appointed boards and commission.
- Business letter writing and the standard format for reports and correspondence.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors and District staff.

Ability to:

- Perform detailed and technical account, financial, and payroll support work accurately and in a timely manner.
- Assist in preparing clear, complete and concise financial statements and reports.
- Audit review, post, balance, reconcile, and maintain accurate and confidential accounting and payroll records.
- Maintain confidentiality and be discreet in handling and processing confidential information and data.
- Prepare, maintain and reconcile various complex financial, accounting and budgeting records.
- Participate in the preparation of department budget, including gathering and analyzing data related to expenditures and projected charges and monitoring budget expenditures and revenues
- Interpret, apply, explain and ensure compliance with applicable Federal, State, and local laws, rules, regulations, policies, and procedures.
- Make accurate arithmetic, financial, and statistical computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems
- Compose correspondence and reports independently or from brief instructions.
- Understand and carry out complex oral and written directions
- Research, analyze, and summarize data and prepare accurate and logical written reports.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities and meet critical time deadlines
- Perform responsible administrative support work with accuracy, speed, and general supervision.
- Train, plan, organize, schedule, assign, review, and evaluate the work of assigned staff.
- Understand the organization and operation of the District and of outside agencies as necessary to assume assigned responsibilities.
- Operate modern office equipment, including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Provide varied and responsible office administrative work requiring the use of tact and discretion.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

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

Equivalent to the completion of the twelfth (12th) grade supplemented by college-level coursework in accounting or finance and five (5) years of experience in the maintenance of financial and accounting records, bookkeeping, budgeting, or financial support experience.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle, and to visit various District an meeting sites: vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

EFFECTIVE: September 2015

REVISED: N/A

FLSA: Non-Exempt

Midpeninsula Regional Open Space District - CLASSIFICATION & COMPENSATION PLAN
Fiscal Year 2015/2016 - Effective 09/14/2015

Exhibit C

Last revised: 8/26/15, 7/22/2015, 7/01/2015, 2/12/2015, 1/19/2015, 7/01/2014

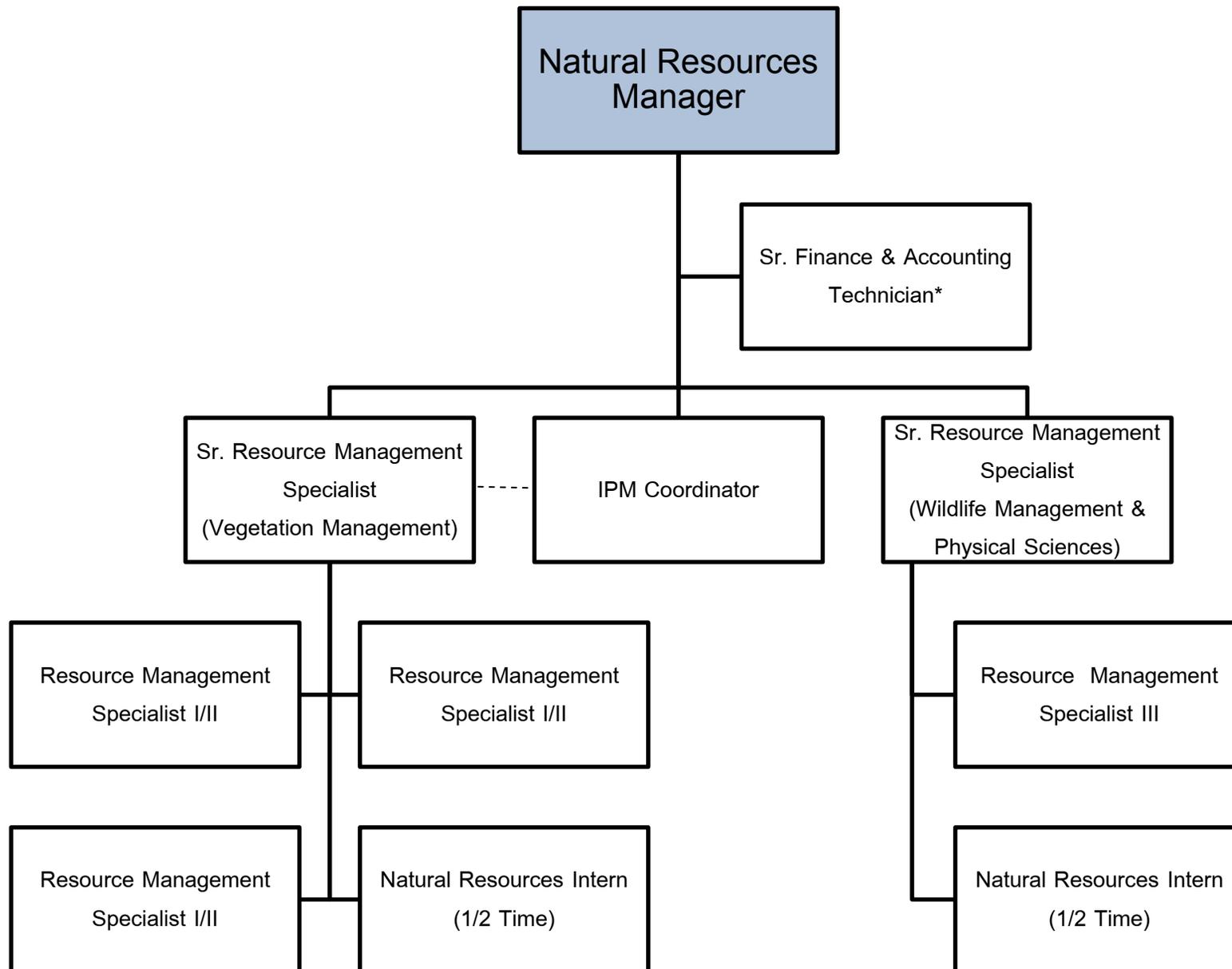
Classification Title	Step Range #	Hourly Range \$		Monthly Range \$		Annual Range \$		Time Base
		Minimum	Maximum	Minimum	Maximum	Minimum	Maximum	
Seasonal Open Space Technician	6	18.946	23.654	3,284	4,100	39,408	49,200	Part-time
Seasonal Ranger Aide	6	18.946	23.654	3,284	4,100	39,408	49,200	Part-time
Seasonal Ranger	16	24.179	30.190	4,191	5,233	50,292	62,796	Part-time
Farm Maintenance Worker	19	26.019	32.492	4,510	5,632	54,120	67,584	Full-time
Open Space Technician*	19	26.019	32.492	4,510	5,632	54,120	67,584	Full-time
Administrative Assistant	20	26.660	33.283	4,621	5,769	55,452	69,228	Full-time
Accounting Technician	22	27.981	34.944	4,850	6,057	58,200	72,684	Full-time
Human Resources Technician	22	27.981	34.944	4,850	6,057	58,200	72,684	Full-time
Lead Open Space Technician*	23	28.690	35.827	4,973	6,210	59,676	74,520	Full-time
GIS Technician	23	28.690	35.827	4,973	6,210	59,676	74,520	Full-time
Volunteer Program Lead	23	28.690	35.827	4,973	6,210	59,676	74,520	Full-time
Risk Management Coordinator	24	29.383	36.698	5,093	6,361	61,116	76,332	Full-time
Senior Administrative Assistant	24	29.383	36.698	5,093	6,361	61,116	76,332	Full-time
Ranger	25	30.121	37.615	5,221	6,520	62,652	78,240	Full-time
Public Affairs Program Coordinator	25	30.121	37.615	5,221	6,520	62,652	78,240	Full-time
Information Technology Technician	25	30.121	37.615	5,221	6,520	62,652	78,240	Full-time
Senior Accounting Technician	26	30.854	38.533	5,348	6,679	64,176	80,148	Full-time
Senior Finance & Accounting Technician	26	30.854	38.533	5,348	6,679	64,176	80,148	Full-time
Equipment Mechanic/Operator	27	31.627	39.496	5,482	6,846	65,784	82,152	Full-time
Lead Ranger	27	31.627	39.496	5,482	6,846	65,784	82,152	Full-time
Executive Assistant	27	31.627	39.496	5,482	6,846	65,784	82,152	Full-time
Real Property Specialist I	28	32.400	40.454	5,616	7,012	67,392	84,144	Full-time
Planner I	29	33.208	41.463	5,756	7,187	69,072	86,244	Full-time
Resource Management Specialist I	30	34.021	42.479	5,897	7,363	70,764	88,356	Full-time
Docent Program Manager	30	34.021	42.479	5,897	7,363	70,764	88,356	Full-time
Volunteer Program Manager	30	34.021	42.479	5,897	7,363	70,764	88,356	Full-time
Planner II	31	34.869	43.540	6,044	7,547	72,528	90,564	Full-time
Management Analyst I	31	34.869	43.540	6,044	7,547	72,528	90,564	Full-time
Accountant	31	34.869	43.540	6,044	7,547	72,528	90,564	Full-time
Public Affairs Specialist	33	36.606	45.721	6,345	7,925	76,140	95,100	Full-time
Community Outreach Specialist	33	36.606	45.721	6,345	7,925	76,140	95,100	Full-time
Resource Management Specialist II	34	37.500	46.835	6,500	8,118	78,000	97,416	Full-time
Training and Safety Specialist	35	38.435	48.000	6,662	8,320	79,944	99,840	Full-time
Real Property Specialist II	35	38.435	48.000	6,662	8,320	79,944	99,840	Full-time
Management Analyst II	35	38.435	48.000	6,662	8,320	79,944	99,840	Full-time

Classification Title	Step Range #	Hourly Range \$		Monthly Range \$		Annual Range \$		Time Base
		Minimum	Maximum	Minimum	Maximum	Minimum	Maximum	
Supervising Ranger	35	38.435	48.000	6,662	8,320	79,944	99,840	Full-time
Maintenance, Construction & Resource Supervisor	35	38.435	48.000	6,662	8,320	79,944	99,840	Full-time
Website Administrator	36	39.381	49.177	6,826	8,524	81,912	102,288	Full-time
Information Technology Administrator	36	39.381	49.177	6,826	8,524	81,912	102,288	Full-time
Planner III	39	42.381	52.921	7,346	9,173	88,152	110,076	Full-time
Resource Management Specialist III	39	42.381	52.921	7,346	9,173	88,152	110,076	Full-time
GIS Administrator	40	43.413	54.219	7,525	9,398	90,300	112,776	Full-time
Senior Real Property Specialist	40	43.413	54.219	7,525	9,398	90,300	112,776	Full-time
Senior Accountant	41	44.498	55.575	7,713	9,633	92,556	115,596	Full-time
Senior Management Analyst	41	44.498	55.575	7,713	9,633	92,556	115,596	Full-time
District Clerk	41	44.498	55.575	7,713	9,633	92,556	115,596	Full-time
Media Communications Supervisor	42	45.583	56.925	7,901	9,867	94,812	118,404	Full-time
Senior Resource Mgmt Specialist	43	46.725	58.356	8,099	10,115	97,188	121,380	Full-time
Area Superintendent	43	46.725	58.356	8,099	10,115	97,188	121,380	Full-time
Human Resources Supervisor	43	46.725	58.356	8,099	10,115	97,188	121,380	Full-time
Senior Planner	43	46.725	58.356	8,099	10,115	97,188	121,380	Full-time
Assistant General Counsel I	46	50.256	62.769	8,711	10,880	104,532	130,560	Full-time
Assistant General Counsel II	48	52.771	65.902	9,147	11,423	109,764	137,076	Full-time
Information Systems & Technology Manager	48	52.771	65.902	9,147	11,423	109,764	137,076	Full-time
Administrative Services Manager	51	56.792	70.927	9,844	12,294	118,128	147,528	Full-time
Engineering & Construction Manager	51	56.792	70.927	9,844	12,294	118,128	147,528	Full-time
Natural Resources Manager	51	56.792	70.927	9,844	12,294	118,128	147,528	Full-time
Operations Manager	51	56.792	70.927	9,844	12,294	118,128	147,528	Full-time
Planning Manager	51	56.792	70.927	9,844	12,294	118,128	147,528	Full-time
Public Affairs Manager	51	56.792	70.927	9,844	12,294	118,128	147,528	Full-time
Real Property Manager	51	56.792	70.927	9,844	12,294	118,128	147,528	Full-time
Assistant General Manager	59	69.035	86.215	11,966	14,944	143,592	179,328	Full-time
Chief Financial Officer/Director of Administrative Services	59	69.035	86.215	11,966	14,944	143,592	179,328	Full-time

* OST will receive an additional 1% stipend for Class A or B license; Lead OST 1% for Class A.

Board Appointee Group Compensation	Hourly Salary	Monthly Salary	Annual Salary	Effective Date	Last Revised
General Manager	\$113.361	\$19,649	\$235,792	4/1/2015	8/26/2015
Controller - <i>Part-time position</i>	\$86.833	\$15,051	\$180,612	4/1/2015	8/12/2015
General Counsel	\$101.996	\$17,679	\$212,152	4/1/2015	8/12/2015

NATURAL RESOURCES DEPARTMENT



*Shared position with Real Property.