DATE	September 6, 2023
TIME	12:00 pm
LOCATION	CAPK Administrative Office 5005 Business Park North Bakersfield, CA 93309

Personnel Committee Agenda

1. **Call to Order**

2. **Roll Call**

Maritza Jimenez (Chair)	Jonathan Mullings
Nila Hogan	Guadalupe Perez

3. **Public Forum**

The public may address the Committee on items not on the agenda but under the jurisdiction of the Committee. Speakers are limited to 3 minutes. If more than one person wishes to address the same topic, the total group time for the topic will be 10 minutes. Please state your name before making your presentation.

4. **New Business**

a. Head Start Personnel Update – ***Info Item (p. 3)***	Jerry Meade, Assistant Director of Head Start, Program Robert Espinosa, Program Design and Management Administrator
b. Updated Head Start Division Job Descriptions and Organizational Chart - ***Action Item (p. 4-19)***	Jerry Meade, Assistant Director of Head Start, Program Robert Espinosa, Program Design and Management Administrator
c. Reclassification of the Administrative Coordinator and Assistant Positions and New Administrative Assistant-Executive Position - ***Action Item (p. 20-33)***	Jeremy T. Tobias, Chief Executive Officer
d. Risk Management Position Reclassification and New Position - ***Action Item (p. 34-43)***	Emilio G. Wagner, Director of Operations

5. **Committee Member Comments**

6. **Next Scheduled Meeting**

Personnel Committee
12:00 pm
October 4, 2023
5005 Business Park North
Bakersfield, CA 93309

7. Adjournment

This is to certify that this Agenda Notice was posted in the lobby of the CAPK Administrative Office at 5005 Business Park North, Bakersfield, CA and online at www.capk.org by 12:00 pm, July 28, 2023. Margaret Frazier-Sanchez, Assistant to the Director of Human Resources.

MEMORANDUM

To: Personnel Committee

From: Jerry Meade, Assistant Director of Head Start, Program
Robert Espinosa, Program Design and Management Administrator

Date: September 6, 2023

Subject: *Agenda Item 4(a):* Head Start Personnel Update – **Info Item**

The Head Start and State Child Development Division is committed in continuing to provide ongoing updates regarding personnel challenges affecting the Head Start program.

- 591 staff employed.
- 110 vacant positions.
- Onboarded 14 staff (13 direct service and one (1) administrative position).
- 19 resignations (17 direct services positions).
- Five (5) days of interviews for 10 open direct service positions.

Job postings are still being featured on the Head Start California website. Program staff continue to explore strategies to build the Head Start workforce to support full enrollment, which includes incentive programs and revamped onboarding targeted for direct services staff.

Both the Retention and Recruitment Incentives were approved at the Board of Director's meeting in August; therefore, there will be a substantial media push for recruitment of the direct services positions with the incentives as identified. Additional efforts for retention and recruitment include a revised new hire orientation process, training plans by position, and supervisory training. These efforts aligned with the work from Human Resources and Finance conducted on the wage comparability and benefit plan for 2024 and are all targeted to support our goal to be the employer of choice.

MEMORANDUM

To: Personnel Committee

From: Jerry Meade, Assistant Director of Head Start, Program
Robert Espinosa, Program Design and Management Administrator

Date: September 6, 2023

Subject: *Agenda Item 4(b)*: Updated Head Start Division Job Descriptions and Organizational Chart – **Action Item**

The Head Start and State Child Development Division has updated the division's organizational chart and two additional job descriptions to align with the reorganization approved by the Board of Directors in March 2023. The updated organizational chart provides clarity on the departmental positions previously shared as "Teams" in the document approved previously. The job descriptions changes allow for consistency in language within each classification, as well as updated antiquated language and incorporate new job descriptions for new positions that will allow for succession planning.

Summary of Proposed Changes

Aligning with the reorganization, the positions below have been added or revised. The Head Start and State Child Development Division worked closely with the Human Resources Department on these changes and collaborated to ensure consistency with like positions within CAPK. The grading of the job descriptions aligns with the approved CAPK Compensation Schedule.

Position Title	Proposed Changes	Current Grade	New Grade
Education Supervisor	Reclassified. Title change. Focus on supervision of mentor coaches and supporting curriculum training for fidelity.	8 Min: $21.09 Mid: $26.34 Max: $31.61	9 Min: $24.21 Mid: $26.34 Max: $31.61
Home Visiting Program Home Visitor	Reclassified. Created two-tier levels within the position based on education and changed grade. The position will be supervised by the Home Visiting Program Coordinator.	6 Min: $18.10 Mid: $21.31 Max: $24.50	7 Min: $19.46 Mid: $22.89 Max: $26.34
Quality Assurance Coordinator	New position. The QA Coordinator has a focus on Community Care Licensing documentation and other QA monitoring as assigned.	N/A	8 Min: $21.09 Mid: $26.34 Max: $31.61

Fiscal Impact and Timeline

The fiscal impact is marginal as these positions align with previously budgeted positions prior to the reorganization. The Head Start leadership team has been working in conjunction with the Finance Division to ensure the positions present are within the Head Start budget.

Strategic Plan Impact

As part of the 2021-25 Strategic Plan, specifically under Goal 4: *CAPK seeks to be an employer of choice and attract and retain a high-quality workforce to achieve the organization's desired results*, this proposal supports staff development, growth, and retention by creating a pathway for current staff or new recruits to be place in supervisory position that will increase their knowledge base and provide experience in order to have the ability to promote within the organization.

Recommendation:

Staff recommends the Personnel Committee approve the Head Start job descriptions and updated organizational chart.

Attachments:
Head Start and State Child Development Organizational Chart
Education Supervisor Job Description
Home Visiting Program Home Visitor Job Description
Quality Assurance Coordinator Job Description

Head Start/ State Child Development Programs

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Community Action Partnership of Kern

Human Resources
Finance
Operations

- Director — Yolanda Gonzales
  - Assistant to the Director
  - Assistant Director ~ Program
    - Administrative Assistant
    - PDM Administrator
      - Administrative Analyst
      - Program Assistant/ Translator
      - Enrollment & Attendance Manager
        - E&A Team
      - Professional Development Manager
        - Professional Development Team
      - Program Governance Coordinator
    - Program Services Administrator
      - Family Childcare Manager
        - Family Childcare Specialist
      - Home Visiting Program Manager
        - Home Visiting Program Team
      - Support Services Manager
        - Family Engagement Supervisor
          - Family Engagement Team
        - Wellness and Inclusion Supervisor
          - Wellness and Inclusion Team
        - Health and Nutrition Supervisor
          - Health and Nutrition Team
    - HS Education Manager
      - Administrative Assistant
      - Education Supervisor (2)
        - Mentor Coaches (8)
      - EHS Partnership Supervisor
        - Family Advocates (4)
  - Center-Based Administrator
    - Program Managers (4)
      - Site Supervisors
        - Center Staff
      - Administrative Assistant
  - Quality Assurance Administrator
    - Quality Assurance Coordinator
    - Data Supervisor
      - Quality Assurance Technician
      - Quality Assurance Manager
        - Quality Assurance Specialists (5)
        - Quality Assurance Technician
  - Administrative Assistant
  - Assistant Director San Joaquin
    - Program Assistant
    - Home-Base Manager
      - Home-Base Supervisors (2)
      - EHS Education Manager
        - Education Supervisor
          - Mentor Coaches (2)
      - Maintenance Manager
        - Maintenance Technicians (2)
      - Program Manager SJC
    - Early Childhood Educators Kern (13) SJC (12)

Legend:
- Detail on next page
- New Supervisor
- New Position

* HR Technician
* Program Manager
* Information Systems Specialist

Education Supervisor

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 09 **FLSA Status:** Non-exempt **Date Approved:** TBD

SUMMARY:
Under the direction of the Education Manager, the Education Supervisor is a member of the Education Team and is responsible for assisting in the development and planning of a comprehensive Head Start and Early Head Start program, including providing leadership and technical expertise for program staff. The education supervisor is responsible for monitoring, training, reporting education data collection and record-keeping, and collaborating within the program education service area.

SUPERVISION RECEIVED:
Receives supervision from the Education Manager.

SUPERVISION EXERCISED:
Mentor Coaches

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:

- Provides research, development, and planning of Head Start and Early Head Start curriculum.
- Monitors a variety of data and develops and implements plans for program improvement.
- Under the direction of the Education Manager, functions as a member of the education team and leads support in technical assistance to staff in the development, planning, and implementation of plans of action.
- Reviews written data analysis, reports, and records of collected data with the education team with recommendations for improvement regarding education non-compliance areas. (e.g., programmatic education operations).
- Monitors curriculum to ensure the implementation of appropriate curriculum and school readiness activities.
- Responsible for providing training on curriculum, educational assessments, and school readiness.
- Conducts additional research activities that include educational trends, educational pilot programs, and ACF informational memorandums to provide support to program managers.
- Analyzes a variety of data sources to facilitate a curriculum that is consistent with a comprehensive quality ECE program.
- Collaborates with community agencies and professionals to ensure and strengthen connections for the Agency's children and families.
- School Readiness Implementation:

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- Aligns and establishes child goals from the Child Development and early learning framework.
- Creates and implements a plan of action for achieving goals.
- Assesses child progress on an ongoing basis and analyze data 2-3 times a year.
- Examines data for patterns of progress for groups of children to develop and implements a plan for program improvement.
- Maintains close communication with the Education Manager for recommended courses of action and to receive directives on priorities.
- Works closely and communicates with the Education Manager involving plans for Education.
- Assists in planning, organizing, implementing, and participating in training for the Program Managers and teaching staff.
- In alignment with school readiness goals, coordinates, and monitors the assessment of all Early Head Start/Head Start children three (3) times a year using the designated assessment instrument (DRDP).
- Coordinates the collecting of data from the designated assessment instrument three (3) times a year for administrative planning and training of staff.
- Conducts on-site visits periodically at Early Head Start/Head Start centers.

Other Job Specific Duties:

- Attends all meetings, trainings, and conferences as assigned.
- Maintains a safe and functional work environment.
- Works alternative hours as required, including nights and weekends.
- Is proactive in the effort to recruit and enroll families that qualify for Head Start/State Child Development programs, including participating in recruitment events.
- Performs any other like duties as assigned.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Age and developmentally appropriate education practices for children aged 0-5.
- Reflective supervision process, analyze problems, and identify alternative solutions.
- Experience working with adults and children.
- Conducting developmental assessments of children.
- Departmental policies and procedures.
- Correspondence and report writing practices and procedures.
- Current problems of socially and economically diverse families.
- Modern office practices, methods, procedures, and equipment, including computers.
- Word processing, spreadsheet, database, and related software applications.
- Agency policies and procedures.
- Proper grammar in written communication.
- Applicable federal, state, and local laws, codes, and regulations.

Ability to:

- Ensure confidentiality.

- Reasonably obtain knowledge of Agency policies and procedures.
- Able to deal with conceptual matters.
- Plan, organize, allocate, and control substantial resources.
- Communicate effectively, verbally and in writing.
- Demonstrate professional interpersonal skills.
- Work as a positive team member.
- Work independently
- Prepare clear and concise reports.
- Attend evening and weekend meetings.
- Exercise sound, independent judgment within general policy guidelines.
- Establish professional working relationships with staff, agencies, and parents.
- Work with accuracy and attention to detail.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Bachelor's degree in child development, education, human development, or related field.
- Possess, or obtain within 30 days, a Site Supervisor Permit or higher issued by the California Commission on Teacher Credentialing.
- Three (3) years working in an administrative field with an emphasis on finance, social services, case management, public administration, child development, or related field.
- Two (2) years of supervisory experience. Any equivalent combination of education, training, and experience which will provide the capabilities to perform the described duties will be considered.

OTHER REQUIREMENTS:

- Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must have reliable transportation during work hours as traveling throughout Kern County is necessary.
- Must be fingerprinted, if required by funding source or state licensing, and have such records filed with the State Department of Social Services, Community Care Licensing.
- Must have completed a First Aid/CPR certificate or obtain one within 90 days of employment.
- Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

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ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE Education Supervisor			
Activity **Hours Per Day**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
Sitting			x
Walking			x
Standing			x
Bending (neck)			x
Bending (waist)			x
Squatting		x	
Climbing	x		
Kneeling		x	
Crawling	x		
Twisting (neck)			x
Twisting (waist)			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)		x	
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing & Pulling (left hand)		x	
Reaching (above shoulder level)		x	
Reaching (below shoulder level)		x	

	LIFTING			CARRYING		
	NEVER 0 HOURS	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
0-10 lbs			x			x
11-25 lbs		x			x	
26-50 lbs		x			x	
51-75l bs	x			x		
76-100 lbs	x			x		
100+ lbs	x					

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Home Visiting Program Home Visitor

Level 1
Level 2

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 07 **FLSA Status:** Non-Exempt **Date Approved:** TBD

SUMMARY:

Under the direction of the Home Visiting Program (HVP) Coordinator, the HVP Home Visitor leads and shares responsibility with parents for planning, organizing, and implementing the care, development, and education of typical and atypically developing children (birth to 3 and expectant mothers) with a case load of up to 10 families. Responsible for implementing a quality early education home based curriculum and developing a positive relationship with children, parents, and families. The Home Visitor will provide the parent with parent education, assistance with job readiness and barrier removal. The goal of the Home Visitor is to help families reach self-sufficiency by improving family engagement practices; supporting healthy development of young children living in poverty; and preparing parents for employment.

SUPERVISION RECEIVED:

Receives supervision from HVP Coordinator.

SUPERVISION EXERCISED:

None.

DUTIES AND RESPONSIBILITIES:

Disclaimer - This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:

- Plan and conduct weekly home visit activities according to adopted curriculum and with expectant mothers, families, and their young children in their homes for a minimum of two (2) hours for each of the families in the assigned caseload.
- Coordinate, schedule, plan, and implement monthly group socialization experiences in collaboration with families.
- Meet with assigned Department of Human Services staff each month to provide case management for enrolled families.
- Provide parent/child relationship building experiences and utilize families home as learning environment to ensure school readiness.
- Conduct screenings and assessments of children in partnership with parents.
- Provide appropriate referrals based on analysis of observations, screenings, and assessments.

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- Support families in identifying developmentally appropriate goals for children and parents.
- Assist parents in implementing developmentally appropriate routines, activities, and experiences to support Individual Family Service Plan/Individual Educational Plan (IFSP/IEP).
- Partner with expectant mothers and families to obtain ongoing access to health and dental care.
- Provide crisis intervention and referral services to internal and/or external resources.
- Complete and maintain accurate and timely documentation of home visits and group socializations.
- Complete and maintain accurate and timely documentation of child and family services and health status in program database system.
- Assess family interests, strengths, and needs as part of program surveys.
- Collaborate with families to develop a Family Partnership Agreement. Provide support and resources to assist families to reach their goal.
- Promote family engagement in curriculum planning and program governance.
- Recruit and complete application process to maintain full enrollment throughout the year.
- Responsible for transitioning children from the home-based program to an Early Head Start/Head Start or other appropriate childcare setting.
- Attend trainings, meetings, conferences, and community collaborative meetings as required and be capable.
- Participate in professional development activities. Attend meetings and represent CAPK in community committees as assigned.
- Follow procedures as a Mandated Reporter to report suspected child abuse/neglect and ensure compliance of universal precautions.
- Maintain confidentiality of family information and records.

Other Job Specific Duties:

- Maintains safe and functional work environment.
- Works alternative hours as required, including nights and weekends.
- Performs other tasks as may be required for the efficient operation of the comprehensive, integrated program.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Correspondence and report writing practices and procedures.
- Current problems of socially and economically challenged families.
- The contributions of parents and volunteers who may be non-professional.
- Modern office practices, methods, procedures, and equipment including computers.
- Word processing, spreadsheet, database, and other related software applications.
- Child development, early childhood education, child nutrition, health and safety, family dynamics, community resources and adult education

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Ability to:

- Plan and implement developmentally appropriate routines, activities, and experiences.
- Facilitate the educational, intellectual, social, emotional, and physical development of children.
- Plan, organize, and allocate resources.
- Work independently.
- Prepare clear, concise reports.
- Exercise sound, independent judgment within general policy guidelines.
- Provide guidance and interpret and explain policies and procedures.
- Analyze problems; identify alternative solutions.
- Communicate effectively verbally and in writing.
- Work with accuracy and attention to detail.
- Operate and use modern office equipment.
- Effectively organize and prioritize assigned work.
- Establish professional working relationships with staff, agencies, and parents.
- Exhibit an understanding and design of a curriculum which fosters appreciation of cultural and linguistic diversity, integrates health and nutrition education, promotes language development, art, music, and dramatic play, and develops mathematical and science concepts.
- Reasonably obtain knowledge of agency and departmental policies and procedures.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

Level 1

- Associate degree from any accredited college or university in early childhood development, human development, or related field with twenty-four (24 college semester units in child development, early childhood development, or similar area of study).
- Three (3) units of infant/toddler coursework from any accredited college or university.

Level 2

- Bachelor's degree from any accredited college or university in early childhood development, human developments, or related field with twenty-four (24 college semester units in child development, early childhood development, or similar area of study).
- Three (3) units of infant/toddler coursework from any accredited college or university.
- One year experience in data entry.

OTHER REQUIREMENTS:

- Two years' experience working with a community service program desirable.
- Bilingual (English/Spanish) capabilities desirable.
- Possession of a valid California Driver's License and State automobile insurance, and

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acceptable driving record substantiated by a DMV printout.

- Must be fingerprinted if required by funding source or state licensing and have such records filed with the State Department of Social Services, Community Care Licensing
- Successful completion of physical, substance abuse screening, TB, and all required vaccinations upon offer of employment.
- Must have completed a Pediatric First Aid/CPR Certification or will obtain the certification within 90 days of employment and monitor and recertify prior to expiration (annually or as noted on certification.) CPR class must be taken in person and must include infant components.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE Home Visiting Program Home Visitor			
Activity **Hours Per Day**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
Sitting			x
Walking			x
Standing			x
Bending (neck)			x
Bending (waist)			x
Squatting		x	
Climbing	x		
Kneeling		x	
Crawling	x		
Twisting (neck)			x
Twisting (waist)			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)		x	
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing & Pulling (left hand)		x	

Reaching (above shoulder level)		x	
Reaching (below shoulder level)		x	

	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS
0-10 lbs.			x			x
11-25 lbs.		x			x	
26-50 lbs.		x			x	
51-75 lbs.	x			x		
76-100 lbs.	x			x		
100+ lbs.	x			x		

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Quality Assurance Coordinator

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 08 **FLSA Status:** Non-Exempt **Date Approved:** TBD

SUMMARY:
Under the supervision of the Quality Assurance Administrator, the Quality Assurance Coordinator is responsible for maintaining compliance with Community Care Licensing requirements and assists with meeting deliverables of the Head Start and Child Development contracts. This includes inspection, ongoing monitoring for compliance of the program, and investigation activities. The work is carried out under the general supervision of the Quality Assurance Administrator but calls for considerable independent judgement.

SUPERVISION RECEIVED:
Receives supervision from Quality Assurance Administrator.

SUPERVISION EXERCISED:
None.

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:

- Provides training, technical assistance, and support to program and administrative staff.
- Compiles all documentation required by Community Care Licensing for licensure of child development centers.
- Disseminates information regarding the licensing process, the rules governing facilities, and the legal requirements for licensure.
- Visits facilities for the purpose of inspection and monitoring of facilities as required for continuation of license, as well as complaint investigations.
- Maintains a strong understanding of Head Start Program Performance Standards (HSPPS), California Code of Regulations Title 5 (CDE), and Title 22 (Community Care Licensing).
- Analyzes and interprets data, drawing meaning and conclusions from quantitative and/or qualitative data.
- Informs, networks with, and monitors governing bodies to ensure their understanding and implementation of appropriate governance oversight and accountability.
- Assists with the annual Self-Assessment for the Head Start/ State Child Development and uses information to address continuous agency-wide improvement.
- Assists with annual audits, funding source/regulatory audits and monitoring visits.

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- Establishes and maintains positive, constructive working relationships with staff and Program Partners to ensure their compliance with program requirements.
- Reports areas of compliance and non-compliance to the Quality Assurance Administrator and administrative team as needed.
- Responsible for developing, maintaining, and updating written policies and procedures as needed.
- Responsible for preparation of data, budgets, and monitoring reports to be submitted to theBoard of Directors, Policy Council, Head Start Regional Office, California Department of Education, California Department of Social Services, and finance department.

Other Job Specific Duties:

- Attends all meetings, trainings, and conferences as assigned.
- Maintains a safe and functional work environment.
- Works alternative hours as assigned, including nights and weekends.
- Performs any other duties as assigned.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Agency policies and procedures.
- Applicable federal, state, and local laws, codes, and regulations.
- Departmental policies and procedures.
- Understanding socially and economically diverse challenged families.
- Modern office practices, methods, procedures, and equipment, including computers.
- Word processing, spreadsheet, database, and related software applications.
- Knowledge of proper grammar in written communication.
- Regulations governing the fiscal requirements of Head Start, California Department of
- Education, California Department of Social Services California Code of Regulations Title 5 (CDE), Title 22 (Community Care Licensing) and Child and Adult Care Food Program.

Ability to:

- Deal with conceptual matters.
- Plan, organize, and allocate resources.
- Work independently.
- Communicate effectively, verbally and in writing.
- Prepare clear and concise reports.
- Exercise sound, independent judgment within general policy guidelines.
- Provide guidance and explain policies and procedures.
- Analyze problems and identify alternative solutions.
- Work with accuracy and attention to detail.
- Effectively organize and prioritize assigned work.
- Establish and maintain effective working relationships with staff, agencies, and parents.

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EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Associate degree from an accredited college or university with a major in social services, early childhood development, human services, behavioral science, public or business administration is required.
- Bachelor's degree from an accredited college or university in public administration, business administration, early childhood education, child development, social services, or related field preferred.
- Three (3) years' working in an administrative field with an emphasis on finance, social services, case management, public administration, child development, or related field.
- Additional experience may be substituted for education requirements.

OTHER REQUIREMENTS:

- Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must be fingerprinted and have such records filed with the State Department of Social Services and Community Care Licensing.
- Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE: Quality Assurance Coordinator			
Activity **Hours Per Day**	**NEVER 0 HOURS**	**OCCASIONAL UP TO 4 HOURS**	**FREQUENT4-8 HOURS**
Sitting			X
Walking			X
Standing			X
Bending (neck)			X
Bending (waist)			X
Squatting		X	
Climbing	X		

Kneeling		x	
Crawling	x		
Twisting (neck)			x
Twisting (waist)			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)			
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing & Pulling (left hand)		x	
Reaching (above shoulder level)		x	
Reaching (below shoulder level)		x	

	LIFTING			CARRYING		
	NEVER 0 HOURS	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
0-10 lbs.			x			x
11-25 lbs.		x			x	
26-50 lbs.		x			x	
51-75 lbs.		X			X	
76-100 lbs.	x			x		
100+ lbs.	x			x		

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MEMORANDUM

To: Personnel Committee

From: Jeremy T. Tobias, Chief Executive Officer

Date: September 6, 2023

Subject: *Agenda Item 4(c)*: Reclassification of the Administrative Coordinator and Assistant Positions and New Administrative Assistant-Executive Position – **Action Item**

The administrative and clerical scope of work for the existing positions that support the Chiefs and Directors is expanding due to the complexity of the departments and the demands of the supported positions. Often, the supportive services positions are also extended to program staff for the purposes of coordination of travel and credit card reconciliation, for example. This includes project management for interagency and time-sensitive projects, such as evaluating software, mapping services to outcomes, and assisting with policy and procedure development.

Summary of Proposed Changes

Below is a description of the proposed position changes and fiscal sustainability:

Position Title	Proposed Changes	Current Grade	New Grade
Executive Assistant	Formerly the Administrative Coordinator, this position was reclassified to an Executive Assistant role to better align with its scope of providing confidential administrative support to the Chief Executive Officer while maintaining the official agency records, managing all the Board of Directors and sub-committee meetings and correspondence, and providing administrative support to the Board of Directors. Further, this position is changing to an exempt position, which is typically part of the salary model of work, frequently seen in executive, supervisory, administrative, and other professional positions.	9 Min: $24.21 Mid: $30.30 Max: $36.36	10 Min: $27.88 Mid: $34.83 Max: $41.80
Administrative Coordinator	Formerly the Assistant to the Director, this position was re-classified to an Administrative Coordinator role to better align with its scope of performing sensitive and confidential administrative assistant/secretarial functions for the Director with special assistance to the Division's team, as well as maintaining official records and provides administrative support to the Divisions.	8 Min: $21.09 Mid: $26.34 Max: $31.61	9 Min: $24.21 Mid: $30.30 Max: $36.36
Administrative Assistant-Executive	New Position. Receives supervision from the Executive Assistant (proposed above) to perform a wide variety of administrative and clerical duties, in addition to supporting special projects, interactions with high-level external and internal contacts requiring specialized confidential subject matter	N/A	6 Min: $18.10 Mid: $21.31 Max: $24.50

	expertise in business administration, information systems, and personnel management, and the application and interpretation of federal, state, and local laws related to these subject areas.		

Fiscal Impact and Timeframe

The proposed new position, the administrative assistant-executive, is projected to have a fiscal impact of be $23,400 in salary costs and $7,472 in benefits for the remainder of the year, which was budgeted as part of a budget revision presented during the August 16, 2023, Budget and Finance Committee[1]. Since the position has been budgeted, there is no further fiscal impact and the fiscal impact for future years would be planned for during the annual budget development process.

The reclassification of the two above-mentioned positions would result in no fiscal impact on the budget since there are no changes to the rate of pay, but rather the grade changes that allow for growth opportunities. The funds available have been budgeted and will not require budget amendments.

Once the proposal is approved (September 2023), the Divisions will immediately implement the changes. The new and reclassification of the job descriptions and fiscal impact have been reviewed and approved by the Human Resources and Finance departments, respectively.

Strategic Plan Impact

As part of the 2021-25 Strategic Plan, specifically under Goal 4: *CAPK seeks to be an employer of choice and attract and retain a high-quality workforce to achieve the organization's desired results*, and as part of following objectives, the proposal supports staff development, growth, and retention:

- Objective 4.1: Enhance leadership capacity, effectiveness, and sustainability.
    - 4.1.1 Establish a process of workforce development for succession and knowledge transfer plans and oversee implementation; (a) Analyze department metrics (i.e., length of service, knowledge gaps, areas of interest) to identify the necessary skills sets for each position; (b) Identify or create evidence-based workforce development strategies to address needs of the department, and (c) Incorporate development opportunities as part of the employee review process.
- Objective 4.2: Increase employee engagement, morale, and retention.
    - 4.2.1 Conduct an internal and external equity analysis to evaluate the labor market and fiscal impacts; (b) b) Complete development and consolidation of revised job descriptions.

Recommendation:

Staff recommends the Personnel Committee approve the reclassification of the Administrative Coordinator and Assistant positions and the new Administrative Assistant-Executive position and update of the organizational chart.

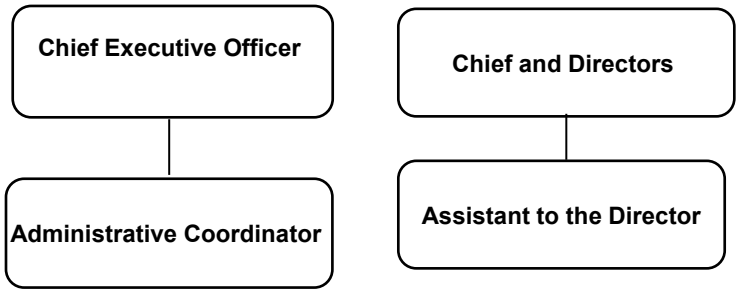
Attachments:

Organizational Chart
Executive Assistant Job Description
Administrative Coordinator Job Description
Administrative Assistant-Executive Job Description

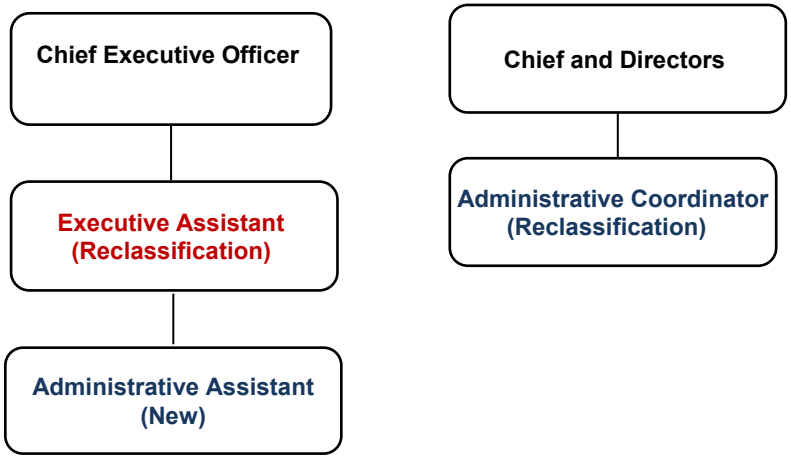
[1] Item 4.b. BF-Committee-Agenda-8-16-23-REVISED.pdf (exactdn.com)

Administrative Support
Multi-Division

Current



Proposed



Administrative Assistant – Executive Division

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 06 **FLSA Status:** Non-Exempt **Date Approved:** TBD

SUMMARY:
Provides a wide variety of administrative and clerical duties, assists with maintaining and securing confidential files, arranging travel for executive and program staff, process check requests and purchase orders, input Board Member volunteer hours into the Volunteer Management System, provide assistance with Board and Committee meeting set-up, approve conference room reservation requests, provide back-up support to the receptionist, as needed, and submit work orders for office maintenance and copiers. The administrative assistant will relieve the supervisor of a wide variety of administrative details and interacts with high-level external and internal contacts requiring specialized confidential subject matter expertise in business administration, information systems, and personnel management, including the application and interpretation of federal, state, and local laws related to these subject areas.

SUPERVISION RECEIVED:
Receives supervision from the Administrative Coordinator.

SUPERVISION EXERCISED:
None

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:

- Apply knowledge of agency guidelines and policies.
- Prepare travel documents for various staff, including booking flights, hotel rooms, registration for conferences, travel advances, and travel liquidation.
- Maintain electronic files of all travel related documents.
- Responsible for maintaining and securing confidential files.
- Input Board Member volunteer hours into the Volunteer Management System.
- Input check requests and purchase order requests.
- Assist with room set-up and clean-up for Board and Committee meetings, and other meeting preparations, as assigned.
- Prioritize workflow, including handling routine matters such as distributing mail, faxing, and photocopying.
- Order, monitor, and maintain department office supplies.
- Efficient planning, organizing, and scheduling work priorities.
- Responsible for approving conference room reservation requests.
- Provide back-up support for receptionist as needed.
- Other administrative duties as assigned.

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Other Job Specific Duties:

- Attend all meetings, trainings, and conferences as assigned.
- Maintain a safe and functional work environment.
- Perform any other like duties as assigned.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Agency policies and procedures.
- Applicable federal, state, and local laws, codes, and regulations.
- Departmental policies and procedures.
- Correspondence and report writing practices and procedures.
- Current problems of socially and economically challenged families.
- Modern office practices, methods, procedures, and equipment, including computers.
- Word processing, spreadsheet, database, and related software applications.

Ability to:

- Problem solve and address conceptual matters.
- Plan, organize, allocate, and control substantial resources.
- Communicate effectively, verbally and in writing.
- Demonstrate good interpersonal skills.
- Establish professional working relationships with staff.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- High school diploma or equivalent
- Three (3) years of clerical experience.

OTHER REQUIREMENTS:

- Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must be fingerprinted and pass pre-employment background check.
- Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.

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- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform' the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE Administrative Assistant			
Activity **Hours Per Day**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
Sitting			x
Walking			x
Standing			x
Bending (neck)			x
Bending (waist)			x
Squatting		x	
Climbing	x		
Kneeling		x	
Crawling	x		
Twisting (neck)			x
Twisting (waist)			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)		x	
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing & Pulling (left hand)		x	
Reaching (above shoulder level)		x	
Reaching (below shoulder level)		x	

	LIFTING			CARRYING		
	NEVER 0 HOURS	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
0-10 lbs			x			x
11-25 lbs		x			x	
26-50 lbs		x			x	
51-75 lbs	x			x		
76-100 lbs	x			x		
100+ lbs	x					

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Administrative Coordinator

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 09 **FLSA Status:** Non-Exempt **Date Approved:** TBD

SUMMARY:
Under the direction of the Division Director, performs sensitive and confidential administrative assistant/secretarial functions for the Director with special assistance to the Division's team. Maintains official records and provides administrative support to the Division.

SUPERVISION RECEIVED:
Receives supervision from Division Director.

SUPERVISION EXERCISED:
None

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Performs a wide variety of duties for the Director that are complex, detailed, and highly confidential.
- Maintains official records system for the Division.
- Coordinates, plans, and serves as the primary point of contact for Director's management team meetings.
- Manages and coordinates the Director's calendar, meetings, phone calls, and other administrative tasks to help manage the priorities of the Director.
- Acts as the primary liaison for communication within the Agency's departments and responds to queries for general information.
- Provides general information to the public as required.
- Monitors budget for department managed by the Director.
- Prepares a variety of internal and external correspondence and completes forms and memos for distribution as needed.
- Reviews and assembles information and documents for Committee agendas in accordance with the Ralph M. Brown Act.
- Responsible for preparing committee packets and correspondence, takes minutes at various Board and Committee meetings, and transcribes into final minutes for distribution.

Other Job Specific Duties:
- Attends all meetings, trainings, and conferences as assigned.
- Is proactive in the effort to recruit and enroll families that qualify for CAPK programs.
- Performs any other like duties as assigned or as needed.

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- Schedules and organizes activities such as meetings, training, and travel for the Director and staff.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Agency policies and procedures.
- Applicable federal, state, and local laws, codes, and regulations.
- Departmental policies and procedures.
- Correspondence and report writing practices and procedures.
- Modern office practice, procedures, and equipment, including computers.
- Record-keeping and report writing techniques.
- Current problems of socially and economically challenged families.
- The contributions of parents and volunteers who may be non-professional.
- Word processing, spreadsheet, database, and other related software applications.
- Organizational and procedure principles and research techniques.
- Basic budgetary principles.
- Language translation and interpretation strategies and techniques.

Ability to:

- Deal with conceptual matters.
- Demonstrate excellent problem-solving skills.
- Communicate effectively, verbally and in writing.
- Communicate orally in public.
- Prepare official agendas, meeting minutes, and public and other legal notices.
- Compose professional letters, memos, reports, and a variety of internal and external correspondence.
- Organize and maintain office files, records, and logs.
- Work with minimal supervision.
- Maintain confidentiality of sensitive documents and information.
- Plan, organize, allocate, and control substantial resources.
- Exercise independent discretionary judgment in a professional manner.
- Demonstrate good interpersonal skills.
- Attend evening and weekend meetings.
- Effectively present program information to the public.
- Establish professional working relationships with staff, agencies, and parents.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Completion of two (2) years of college or equivalent level course work in business or public administration, record management, or a related field
- Minimum of four (4) years of responsible administrative assistant work, including document and records management.

- Any combination of education and or experience that demonstrates a high degree of competency.

OTHER REQUIREMENTS:

- Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must be fingerprinted and pass pre-employment background check.
- Bilingual language fluency (English/Spanish) desirable.
- Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE Administrative Coordinator			
Activity **Hours Per Day**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
Sitting			x
Walking			x
Standing			x
Bending (neck)			x
Bending (waist)			x
Squatting		x	
Climbing	x		
Kneeling		x	
Crawling	x		
Twisting (neck)			x
Twisting (waist)			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)		x	
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing & Pulling (left hand)		x	
Reaching (above shoulder level)		x	

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Reaching (below shoulder level)		x	

	LIFTING			CARRYING		
	NEVER 0 HOURS	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
0-10 lbs			x			x
11-25 lbs		x			x	
26-50 lbs		x			x	
51-75 lbs	x			x		
76-100 lbs	x			x		
100+ lbs	x					

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Executive Assistant

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 10 **FLSA Status:** Exempt **Date Approved:** TBD

SUMMARY:
Under the direction of the Chief Executive Officer (CEO), the Executive Assistant is responsible for providing confidential administrative support to the Chief Executive Officer while maintaining the official records of Community Action Partnership of Kern (CAPK), managing all the Board of Directors and sub-committee meetings and correspondence, and providing administrative support to the Board of Directors.

SUPERVISION RECEIVED:
Receives general direction from the Chief Executive Officer.

SUPERVISION EXERCISED:
Administrative Assistant assigned to Executive Division and Reception Staff assigned to the Administrative Office.

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:

- Performs a wide variety of duties for the Chief Executive Officer that are complex, detailed, and highly confidential, including reports to the Board of Directors.
- Prepares a variety of internal and external correspondence and completes forms and memos for distribution as needed.
- Provide administrative support to Chief Business Development Officer and staff.
- Supervise the administrative assistant assigned to the Executive Division and the reception staff assigned to the Administrative Office and provide training and oversight of all assigned functions.
- Acts as the primary contact for the Board of Directors for administrative support purposes.
- Prepare Board and Executive Committee agendas in accordance with the Ralph M. Brown Act.
- Attend all Board and Executive Committee meetings and take minutes for final review/approval by the CEO.
- Provide training support to the administrative assistant and administrative coordinators responsible for preparation of Board Committee agendas and minutes, travel documents, and credit card liquidations.
- Prepare all travel documents and liquidations for CEO and Board of Directors, and delegate other travel requests to Administrative Assistant.
- Act as the Revenue Contract Administrator responsible for data input of all revenue contracts into the contract management system, route contracts for approvals, ensure all

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required supplemental documents are completed and returned with contracts and amendments, and track history of all activities associated with contracts. Prepare detailed training manual and provide training to executive and management staff regarding the Contract Management System.

- Assigned as the CSD Repository Administrator responsible for uploading all required CSBG/Energy documents into the CSD portal.
- Provide training, as requested, to new CAPK management employees regarding CAPK Governance and Contract Management.
- Provide Notary Public services for all agency documents requiring notarization.
- Participate as a key team member responsible for coordinating agency functions and employee gifts.
- Primary contact and liaison for the Executive Office regarding work orders, and delegate the scheduling of meeting rooms to administrative assistant assigned to the Executive Division.
- Act as the primary back-up to provide administrative support to CAPK's Chief's and Directors as needed.
- Exercise sound, independent judgment within general policy guidelines.

Other Job Specific Duties:

- Effectively presents information and responds to questions from managers, clients, and the public.
- Schedules and organizes activities such as meetings and travel for the Chief Executive Officer and the Board of Directors.
- Handles the Chief Executive Officer incoming/outgoing mail, screens both internal and external phone calls and visitors.
- Performs special assignments/projects and other duties as assigned by the Chief Executive Officer.
- Other confidential duties as assigned by the CEO.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Agency policies and procedures.
- Applicable federal, state, and local laws, codes, and regulations.
- Principles and practices of administration, budgeting, and fiscal oversight.
- Principles and practices of project management.
- Principles and practices of personnel practices.
- Modern office procedures and equipment, including computers.
- Word processing and other related software applications.

Ability to:

- Prepare clear and concise reports.
- Work collaboratively as a member of the Partnership's Executive and Management teams.
- Communicate effectively, verbally and in writing.

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- Work with accuracy and attention to detail.
- Operate and use modern office equipment.
- Effectively organize and prioritize assigned work.
- Establish and maintain effective working relationships with other people.
- Maintain and administer an adequate records system.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Completion of two (2) years of college or equivalent level course work in business or public administration, record management, or a related field.
- Four (4) years of experience as an administrative assistant or secretarial position with at least two (2) years assisting a person with high-level management responsibility.
- Minimum of one (1) year of supervisory experience
- Any combination of education and experience demonstrates a high degree of competency.

OTHER REQUIREMENTS:

- Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must be fingerprinted and pass pre-employment background check.
- Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE Executive Assistant			
Activity **Hours Per Day**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
Sitting			x
Walking			x
Standing			x
Bending (neck)			x
Bending (waist)			x
Squatting		x	
Climbing	x		
Kneeling		x	

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Crawling	x		
Twisting (neck)			x
Twisting (waist)			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)		x	
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing & Pulling (left hand)		x	
Reaching (above shoulder level)		x	
Reaching (below shoulder level)		x	

	LIFTING			CARRYING		
	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS
0-10 lbs.			x			x
11-25 lbs.		x			x	
26-50 lbs.		x			x	
51-75 lbs.	x			x		
76-100 lbs.	x			x		
100+ lbs.	x			x		

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MEMORANDUM

To: Personnel Committee

From: Emilio G. Wagner, Director of Operations

Date: September 6, 2023

Subject: *Agenda Item 4(d)*: Risk Management Position Reclassification and New Position - **Action Item**

CAPK has experienced substantial growth over the last few years and the management of risk insurance has not evolved with the growth. With over 900 employees and 95 facilities throughout our service area, it is no longer practical to have one individual to oversee CAPK's safety programs, facility inspections, staff training, and insurance policies. With the proposed addition of a second individual, there will be coverage for the department for future time off, succession planning, and a more balanced workload.

Summary of Proposed Changes

The current position is titled risk management supervisor, and the proposal is to reclassify the title to risk manager and include duties where this position is the lead in developing policies and procedures, training programs, inspection reports, and overseeing one new staff member. To support the risk manager, we are proposing a new position of assistant risk manager who will assist the risk manager in site inspection, policy development, insurance management, report development, and act as backup during time off. The assistant risk manager will report directly to the risk manager.

Position Title	Proposed Changes	Current Grade	New Grade
Risk Manager	Reclassification to include additional duties and title change.	9 Min: $24.21 Mid: $30.30 Max: $36.36	10 Min: $27.88 Mid: $34.83 Max: $41.80
Assistant Risk Manager	New position. Will provide departmental support and report to the risk manager.	N/A	9 Min: $24.21 Mid: $30.30 Max: $36.36

Fiscal Impact and Timeframe

Both positions have been included in the approved Indirect Budget. The new position was included in the budget for eight (8) months; however, there are salary savings due to the delay in requesting approval of the new position. The reclass of the risk manager

will see a grade increase due to added responsibility, which has been captured in the current approved budget.

Strategic Plan Impact
As part of the 2021-25 Strategic Plan, specifically under Goal 4: *CAPK seeks to be an employer of choice and attract and retain a high-quality workforce to achieve the organization's desired results*, this proposal supports staff development, growth, and retention by balancing the workload of such an important position of CAPK. Due to the growth of CAPK over the years it has placed tremendous pressure on one individual to maintain all safety programs. With the addition of the assistant risk manager, the workload will now be balanced.

Recommendation:
Staff recommends the Personnel Committee approve the reclassification of the Risk Manager and the addition of the Assistant Risk Manager position.

Attachments:
Risk Manager Job Description
Assistant Risk Manager Job Description

Assistant Risk Manager

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: 09 **FLSA Status:** Exempt **Date Approved:** TBD

SUMMARY:
Under the direct supervision of the Risk Manager, the Assistant Risk Manager will assist in coordinating and performing functions of the CAPK's risk management and safety program, including occupational safety and health programs, liability claims, insurance programs, risk transfer and loss control, and Head Start Health & Safety.

SUPERVISION RECEIVED:
Receives direct supervision from Risk Manager.

SUPERVISION EXERCISED:
None

DUTIES AND RESPONSIBILITIES:
Disclaimer – This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job-Specific Duties:

- Assists in developing, implementing, and administering effective safety standards and programs for CAPK employees.
- Assists agency in establishing loss prevention programs, procedures, and in completing safety investigations and audits; works with employees in the field to identify unsafe working conditions or practices and recommends solutions to continuously improve the safety of CAPK facilities.
- Reviews and evaluates injury reports; analyzes loss and accident reports to identify potential hazards; coordinates with departments to identify employee safety exposure and implements necessary loss prevention measures.
- Monitors and assists in the development of modified work assignments to facilitate the return to work of injured employees and conducts Interactive Process Meetings.
- Performs ergonomic assessments and provides recommendations for correction and improvement.
- Assists the Risk Manager in identifying general liability exposures and necessary loss prevention measures; makes recommendations to correct or control liability exposures.
- Assists in coordinating the CAPK's safety program; participates and/or facilitates the Operational Risk Management Committee and may prepare agendas, reports and maintain minutes.
- Assists with coordinating safety training related to mitigating losses and assists divisions/departments with maintaining annual training calendars as needed.
- Researches, prepares statistics, and provides analysis and recommendations related to risk management programs.

- Ensures safety program is following Cal-OSHA mandates and updates written Cal OSHA Programs as needed.
- Participates in tracking safety initiatives or programs such as Injury and Illness Prevention Program, Safety Training, and Safety Data Sheets (SDS).
- Assists in reviewing contracts, agreements, and insurance policies to determine applicable coverage.
- Assists with gathering data for preparation of insurance applications and assists with annual insurance policy renewals.

Other Job-Specific Duties:

- Conducts and attends meetings, training, and professional growth activities, as required.
- Works alternative hours as required, including nights and weekends.
- Performs any other like duties as assigned.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Safety regulations and practices involved in operations and safety laws regarding the public sector.
- Administrative practices and procedures involved in insurance and risk management programs, claims investigations, and processing.
- Principles and practices of various insurance policies.
- Basic medical terminology related to safety and risk policies and practices.
- Pertinent federal, state, and local laws, codes, and regulations.
- Principles and practices of record keeping.
- Principles of effective presentation and public speaking.
- Customer service and public relations methods and techniques.
- Office procedures, methods, and equipment, including computers and applicable software.
- Agency policies and procedures.

Ability to:

- Understand, interpret, and explain the application of policies, procedures, and requirements pertaining to assigned areas of responsibility.
- Interpret and explain CAPK's workers' compensation or general liability policies and procedures.
- Implement and administer safety programs and safety-related training activities.
- Analyze problems, evaluate alternatives, and make sound, appropriate recommendations.
- Establish, foster, and maintain effective working relationships with internal and external stakeholders.
- Gather, research, analyze, organize, and disseminate data.
- Exercise sound independent judgment and initiative within established guidelines.
- Plan and organize work to meet changing priorities and deadlines.

- Prepare clear, concise, and accurate analytical reports, correspondence, and other written materials.
- Effectively present to large groups of individuals.
- Exercise tact and diplomacy in dealing with sensitive, complex, and confidential personnel issues and employee situations.
- Operate a computer using relevant word processing and spreadsheet software.
- Communicate effectively, verbally and in writing.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- High School Diploma or equivalent, plus four (4) years demonstrated experience in safety and/or building maintenance/construction.
- Bilingual (English/Spanish) capabilities desirable.

OTHER REQUIREMENTS:

- Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must be fingerprinted and pass the pre-employment background check.
- Successful completion of a physical, substance abuse screening and TB and all required vaccinations.
- Bilingual language fluency (English/Spanish) preferred, but not required.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE Assistant Risk Manager			
ACTIVITY (HOURS PER DAY)	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
Sitting			**X**
Walking			**X**
Standing			**X**
Bending (neck)			**X**
Bending (waist)			**X**
Squatting		**X**	
Climbing	**X**		
Kneeling		**X**	

Crawling	x		
Twisting (neck)			x
Twisting Waist			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)		x	
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing &Pulling (left hand)		x	
Reaching (above shoulder level)		x	
Reaching (below shoulder level)		x	

	LIFTING			CARRYING		
	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS
0-10 lbs			x			x
11-25 lbs		x			x	
26-50 lbs		x			x	
51-75lbs	x			x		
76-100lb	x			x		
100lbs+	x			x		

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Risk Manager

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Grade: 10 **FLSA Status:** Exempt **Date Approved:** TBD

SUMMARY:
Under the direct supervision of the Director of Operations, the Risk Manager will plan, organize, and administer a program of comprehensive risk management and loss control; to analyze, develop and recommend risk management procedures and programs to include workers' compensation, accident investigation, occupational and industrial safety, disaster preparedness, and related activities; to supervise and evaluate the work of a staff engaged in claims adjustment and safety activities.

SUPERVISION RECEIVED:
Receives direct supervision from Director of Operations.

SUPERVISION EXERCISED:
Assistant Risk Manager

DUTIES AND RESPONSIBILITIES:
Disclaimer – This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:

- Develops the implementation, maintenance, and compliance of an agency-wide safety program and workers' compensation program, including updates to the Written Injury and Illness Prevention Program (IIPP).
- Conducts and supervises the routine survey of facilities, work sites, programs, and operations to identify and correct hazardous conditions and potential liabilities.
- Monitors, investigates, and analyzes accidents, accident reports, and safety hazards to initiate corrective action to eliminate unsafe areas and/or acts and make recommendations for preventative action ensuring proper procedures are followed and paperwork completed.
- Develops procedures to maintain complete and current statistics on loss and accident frequency to include OSHA 300A Log, severity, and costs; develops procedures to protect and minimize exposure to general and workers' compensation liability risks.
- Develops safety education and training programs, including training sessions for employees on safety, risk management, loss prevention and monitors for effectiveness.
- Provides assistance to departments in the implementation of and compliance with the California Occupational Safety and Health Act.
- Serves as primary contact and maintains effective working relationships with the agency's workers' compensation carrier, insurance broker and employees to support related safety and workers' compensation activities.

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- Collects data and maintains accurate files and comprehensive reports to include assisting with department budget preparation, federal and state reports, and special projects required by the Director.
- Completes and supervises full facility assessments on a regular basis to inspect for quality control and identify future or immediate facility improvements.
- Coordinates safety training related to mitigating losses and assists divisions/departments with maintaining annual training calendars as needed.
- Maintains and distributes facility evacuation routes.
- Completes playground safety inspections on all agency play structures and keeps records of each inspection.
- Stays current with changes to California Code of regulations Title 24 and 22 and Head Start Environmental Health & Safety Protocol.

Other Job Specific Duties:

- Conducts and attends meetings, training, and professional growth activities, as required.
- Works alternative hours as required, including nights and weekends.
- Performs any other like duties as assigned.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Safety regulations and practices involved in operations and safety laws regarding the public sector.
- Administrative practices and procedures involved in insurance and risk management programs, claims investigations, and processing.
- Principles and practices of various insurance policies.
- Basic medical terminology related to safety and risk policies and practices.
- Pertinent federal, state, and local laws, codes, and regulations.
- Principles and practices of record keeping.
- Principles of effective presentation and public speaking.
- Customer service and public relations methods and techniques.
- Office procedures, methods, and equipment, including computers and applicable software.
- Agency policies and procedures

Ability to:

- Plans and implements developmentally appropriate routines, activities, and experiences.
- Plan, organize, and allocate resources.
- Work independently.
- Prepare clear, concise reports.
- Exercise sound, independent judgment within general policy guidelines.
- Provide guidance and interpret and explain policies and procedures.
- Analyze problems; identify alternative solutions.
- Communicate effectively verbally and in writing.

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- Work with accuracy and attention to detail.
- Operate and use modern office equipment.
- Effectively organize and prioritize assigned work.
- Establish and maintain effective working relationships internally and externally.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Associate of Art Degree from an accredited university in public administration, business administration, human resources, or related field, plus two (2) years demonstrated experience in safety and/or workers' compensation, or high school diploma or equivalent, plus four (4) years demonstrated experience in safety and/or workers' compensation.
- Experience in implementing job safety programs and/or reducing on the job injuries desirable.
- Must possess or must obtain certification as a Playground Safety Inspector through the National Recreation and Parks Association.
- Bilingual (English/Spanish) capabilities desirable

OTHER REQUIRMENTS:

- Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must be fingerprinted and pass the pre-employment background check.
- Successful completion of a physical, substance abuse screening and TB and all required vaccinations.
- Bilingual language fluency (English/Spanish) preferred, but not required.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE Risk Manager			
Activity **Hours Per Day**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
Sitting			x
Walking			x
Standing			x

Bending (neck)			x
Bending (waist)			x
Squatting		x	
Climbing	x		
Kneeling		x	
Crawling	x		
Twisting (neck)			x
Twisting (waist)			x
Is repetitive use of hand required?			x
Simple Grasping (right hand)			x
Simple Grasping (left hand)			x
Power Grasping (right hand)		x	
Power Grasping (left hand)		x	
Fine Manipulation (right hand)			x
Fine Manipulation (left hand)			x
Pushing & Pulling (right hand)		x	
Pushing & Pulling (left hand)		x	
Reaching (above shoulder level)		x	
Reaching (below shoulder level)		x	

	LIFTING			CARRYING		
	NEVER 0 HOURS	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**	**NEVER 0 HOURS**	**OCCASIONALLY UP TO 4 HOURS**	**FREQUENTLY 4-8 HOURS**
0-10 lbs			x			x
11-25 lbs		x			x	
26-50 lbs		x			x	
51-75 lbs	x			x		
76-100 lbs	x			x		
100+ lbs	x					

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