

**THE HUMBOLDT COUNTY OFFICE OF EDUCATION
PERSONNEL COMMISSION****September 10, 2024
3:00 P.M.**Humboldt County Office of Education, 901 Myrtle Ave., Eureka, Ca. 95501
The Magnolia Room**REGULAR SESSION AGENDA****1.0 CALL MEETING TO ORDER/ROLL CALL****2.0 REVIEW/APPROVE MINUTES OF August 13, 2024****3.0 PUBLIC COMMENT (Five-minute limit)****4.0 SUPERINTENDENTS REPORT****5.0 ACTION ITEMS****5.1 CSEA Position Templates and Description Updates – Corey Weber****5.1.1** Advisor, Analyst, Secretary, Specialist, Technician I and Technician II**5.2 New Job Description – Katie Cavanagh****5.2.1** Specialized Funding Technician**5.3 New Job Description – Peter Stoll****5.3.1** Holistic Wellness Coach I/II**5.4 New Job Description – Colby Smart****5.4.1** - School Social Worker - Court and Community Schools**5.5 Job Description Reclassifications & Retitles – Ariel Aaron & Corey Weber****5.5.1** Personnel Benefits Technician (range 12) to Human Resources Specialist (range 15)**5.5.2** Human Resources Analyst (range 18) to Human Resources Advisor (range 20)**5.5.3** Senior Account Technician (range 9) to Accounts Payable and Receivable Auditor (range 12)**6.0 PERSONNEL UPDATES****6.1 REPORT BY DIRECTOR OF HUMAN RESOURCES****6.2 REVIEW OF PROCESS – Termination of Merit System****6.3 NEW HIRES**

- (2) Paraeducator – Court & Community School (FTE 0.86)

- (6) Paraeducator – Glen Paul School (FTE 0.86)
- (3) Behavioral Health Clinician – SELPA (FTE 1.0)
- Principal Account Technician – Fiscal Services (FTE 1.0)
- Department Secretary – Fiscal Services and Transportation (FTE 1.0)
- Occupational Therapist – Special Education (FTE 1.0)
- Intermediate Office Clerk – Prevention & Intervention Services (FTE 1.0)

6.4 POSITION SEPARATION

- Senior Account Technician – Fiscal Services (FTE 1.0)
- Pro Growth Development Technician – Learning Support Services (FTE 1.0)

6.5 VACANT POSITIONS

- School Bus Driver – Transportation (FTE 1.0) **reviewing applications*
- Paraeducator – Glen Paul Pool (FTE 0.86) **multiple vacancies/ongoing recruitment*
- Behavioral Health Intervention Specialist – Student Programs & Services (FTE 1.0)
- Licensed Vocational Nurse/Health Team – Student Programs & Services (FTE 0.5)
- Speech & Language Pathology Assistant – Special Beginnings (FTE 1.0)
- Paraeducator – Special Beginnings (FTE 0.86) **possible offer*
- Paraeducator – Special Beginnings (FTE 0.68)
- (3) Early Childhood Educator 1 – Special Beginnings (FTE 0.57)
- Department Secretary – Special Beginnings (FTE 1.0)
- Temporary Behavioral Health Clinician – SELPA (FTE 0.3) **position being offered*
- Mental Health Clinical Services Program Manager – Prevention & Intervention (FTE 1.0) **on hold*
- Mental Health Clinician – Prevention & Intervention (FTE 1.0) **2nd interview set*
- Department Secretary/Teacher Residency Program – Educational Services (FTE 1.0) **interviews set*
- Paraeducator – Court & Community School (FTE 0.86) **interviews set*
- (2) Paraeducator Short Term – Court & Community School (FTE 0.86) **interviews set*
- Senior Office Clerk – Court & Community School (FTE 1.0)
- School Counselor – Court & Community School (FTE 1.0) **interviews set*
- Senior Account Technician AP/AR Auditor – Business Services (FTE 1.0)
- Senior Account Technician – Business Services (FTE 1.0) **interviews set*
- Accounting Supervisor – Business Services (FTE 1.0)
- Computer Systems Coordinator – Information Technology (FTE 1.0)
- Intermediate HERC Clerk – Learning Support Services (FTE 1.0)

7.0 REVIEW TRAVEL CLAIM

8.0 ADJOURNMENT

**HUMBOLDT COUNTY OFFICE OF EDUCATION
PERSONNEL COMMISSION**

901 Myrtle Avenue, Eureka, CA. 95501

MINUTES**August 13, 2023**

1.0 CALL TO ORDER The Personnel Commission of the Humboldt County Office of Education met in person in a regular session on August 13, 2024. Commissioner Danette Demello called the meeting to order at 3:00 p.m.

Present – Commissioners Will Folger and Danette Demello

Not Present – Commissioner Joe McKinzie

Others Present- Ariel Aaron – Director of Human Resources; Genevive Macias – Director of Early Education; Taylin Titus – Director of Insurance Services; Doug Lee – Director of Technology; Jean Legaz – CSEA President; Katie Cavanagh – Assistant Superintendent, Student Programs & Services; Corey Weber – Assistant Superintendent, Business Services

Public-None present

2.0 REVIEW OF THE MINUTES Commissioners reviewed the minutes from June 11, 2024 and July 16, 2024. Commissioner Folger made a motion to approve minutes. Commissioner Demello seconded. Motion carries.

3.0 PUBLIC COMMENT No comment.

4.0 SUPERINTENDENTS REPORT Director Aaron stood in for Superintendent Michael Davies-Hughes and advised that the normal school schedules are resuming and HCOE is geared up for the start of the year. The Welcome Back Breakfast is to be held this Friday. HCOE has leased H St office space in Eureka and the Prevention & Intervention, Foster & Homeless Youth and some of the Student Programs & Services departments will be located there.

5.0 ACTION ITEMS**5.1 Modified Job Description – Genevive Macias****5.1.1 Education Initiatives Coordinator**

Director Macias advised that this position recently came before the Commission in a different form (and title). This revision is the result of changes within Early Education. The position now includes the TUPE program (Tobacco Use Prevention Education) and much coordination – reporting, compliance, etc. Discussion regarding the increase in minimum

qualifications and range. Director Aaron to review and make sure there is parity amongst similarly titled positions. Commissioner Folger moved to approve the description. Commissioner Demello seconded. Motion carries.

5.2 Modified Job Description & Reclassification– Taylin Titus

5.2.1 Benefits Specialist – Insurance Services

Director Titus stated that the current employee is retiring, so the description is being revisited and updated. The position has evolved and there is more independent work and one-on-one with districts, as well as overseeing (but not managing) the work of the Benefits Clerk. Discussion regarding title, future format of job descriptions, minimum qualifications, etc. Commissioners would like to see the wording “high level” be replaced with “advanced.” This will be done. Reclassification from range 12 to 15 requested. Commissioner Folger moved to approve the description and reclassification. Commissioner Demello seconded. Motion carries.

5.3 New Job Description – Doug Lee

5.3.1 Computer Systems Coordinator

Director Lee let the Commission know this description was based upon an older, approved description from 2000. Since then, technology, duties and needs have all evolved and expanded. This position has many duties relating to network administration (cloud, firewall, cyber security, etc). It will also deal with surveillance, servers and the like. Assistant Superintendent Weber added that this position does not manage people, but programs with a high responsiveness level. Discussion regarding hierarchy of titles within organization, pay range and management status. Commissioner Folger moved to approve the description. Commissioner Demello seconded. Motion carries.

6.0 PERSONNEL UPDATES

6.1 REPORT BY DIRECTOR OF HUMAN RESOURCES

6.1.1 Director Aaron advises she has created an Exit Survey to be sent to employees upon separation. There is also now a Workplace Violence Prevention Plan in place and ongoing training of staff.

6.2 REVIEW OF PROCESS – Termination of Merit System

6.2.1 Per Director Aaron, the petition of 40% of voters was presented by CSEA to the Board of Education. Signatures were confirmed. Next step is to hold an open forum to hear from those in favor and against. This is set for 08/28/24 and notices will be sent out to employees so all know the date, time and purpose. There will be a secret ballot following.

7.0 REVIEW TRAVEL CLAIM

8.0 ADJOURNMENT Commissioner Demello adjourned the meeting at 3:25 pm.



Advisor (Template)

JOB SUMMARY

The Advisor provides leadership, advice and support to Humboldt County Office of Education (HCOE) direct service school district personnel, regarding field-related matters including budget challenges, compliance issues and interpretation of various governmental codes within their assigned department. Ensures that overall policies, practices and/or regulations meet compliance requirements; maintains accurate records; evaluates the feasibility of services within budget parameters and ensures efficient use of financial resources. The Advisor would also be asked to lead or co-lead applicable focused training targeted for all Humboldt County districts and charter schools.

DISTINGUISHING CHARACTERISTICS

An Advisor is the highest level of classified work providing leadership to HCOE and District personnel. The Advisor is responsible for creating and overseeing processes at the District level and providing leadership, advice and support to HCOE staff and LEAs/Districts. This position reports to the assigned department supervisor and works under minimal supervision.

ESSENTIAL DUTIES:

(ENTER HERE BASED ON DEPARTMENT ASSIGNMENT)



EMPLOYMENT STANDARDS:

Knowledge of –

- Advanced math, reading technical information, composing a variety of documents and/or facilitating group discussion and analyzing situations to define issues and draw conclusions.
- Principles of accounting and auditing.
- General applicable governmental codes.
- Standard office practices, methods and procedures
- Data analysis and/or budget analysis.
- Proficiency in electronic spreadsheets pivot tables and related software.

Ability to

- Operate standard office equipment using pertinent software applications.
- Perform assigned department procedures.
- Plan and manage projects.
- Prepare and maintain accurate records.
- Audit compliance reports
- Conduct departmental transactions.
- Work collaboratively and efficiently as part of a departmental team.
- Represent HCOE in the highest professional and ethical standards.
- Communicate effectively with others within the department, across HCOE and with Districts.
- Schedule activities, meetings, and/or events
- Gather, collate, and/or classify data
- Analyze data utilizing defined but different processes
- Work and communicate with a diversity of individuals and/or groups
- Work with data of varied types and/or purposes
- Problem solve in order to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives; and problem solving with equipment is moderate.
- Analyze a variety of financial and statistical information
- Work effectively under time constraints
- Meet deadlines and schedules
- Setting priorities
- Work with detailed information
- Work under limited supervision



EDUCATION AND EXPERIENCE

- Bachelor's degree in related field or Business Administration or equivalent related experience.
- Five (5) years related experience with increasing responsibility in accounting, auditing or financial analysis, including at least four (4) in a school district or county office of education.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range _____ on the adopted salary scale for classified employees.



Analyst (Template)

JOB SUMMARY

Under the direction of the assigned administrator and depending on department, this position performs data processing and fiscal analysis for county office, school districts and/or charter schools; provides technical assistance and support in fiscal, HR and data processing to school districts and/or County Office of Education staff; performs audits of records and expenditures in compliance with California Education Code, GAAP, Federal and State laws and regulations.

DISTINGUISHING CHARACTERISTICS

An analyst provides support and service to HCOE programs, local school districts and charter schools. They analyze various types of data sets including fiscal and demographic. An analyst may also review data sets provided by Federal and State agencies, HCOE programs, local school districts and charter schools. Additionally, analysts may assist others with compiling data and provide guidance in analysis processes. They should also utilize applicable laws, policies and procedures when analyzing and compiling data sets.

ESSENTIAL DUTIES:

(ENTER HERE BASED ON DEPARTMENT ASSIGNMENT)

EMPLOYMENT STANDARDS:

Knowledge of –

- Payroll processing, accounting and administration
- Applications of computers, software and data processing to accounting and payroll
- Accounting principles and procedures
- Payroll standards and policies
- Bargaining agreements
- Oral and written communication
- Department operations and policies
- Principles and practices of training and providing work direction
- Specialized payroll, tax and account analysis report preparation and statistical record-keeping techniques
- Payroll processes for tax withholding, voluntary deductions, garnishments and supplemental insurance
- Operation of a computer and assigned software



Ability to

- Perform highly responsible and technical accounting, audit and fiscal record management and reporting functions
- Analyze financial data to detect and correct errors
- Make recommendations regarding improved procedures, including training programs and technologies
- Audit the work prepared by other school personnel
- Follow written and oral instructions
- Perform complex projects independently and professionally
- Meet schedules and timelines
- Effectively present complex technical information to individuals, small and large groups
- Adjust to changing work demands, including but not limited to changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing, in both one-on-one and large group settings
- Establish and maintain cooperative and effective working relationships
- Guide the work of partnered department personnel
- Work with computerized accounting and data storage and retrieval systems
- Communicate effectively with, and offer technical assistance in specified areas to, district and other management personnel

EDUCATION AND EXPERIENCE

- Bachelor's degree in related field or Business Administration and two (2) years of equivalent related experience, or
- Six (6) years related experience with increasing responsibility in accounting, auditing or financial analysis, with two (2) in a school district or county office of education preferred.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.



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- Other requirements as appropriate for the job responsibilities.

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SALARY: Range _____ on the adopted salary scale for classified employees.



SECRETARY (Template)

JOB SUMMARY

Under the supervision of the department manager, a Secretary serves as receptionist for the department, receives, and transmits telephone and other communications. Performs duties requiring diligent exercise of judgement and initiative. A Secretary performs varying degrees of clerical duties and may handle sensitive data.

DISTINGUISHING CHARACTERISTICS

This position requires the ability to work as part of a team, supporting multiple positions throughout the department. The right candidate will have a positive attitude and the ability to stay calm and practice good judgment under pressure. The ideal candidate will have exceptional ability to handle complex clerical tasks with superior judgment, discretion and confidentiality.

ESSENTIAL DUTIES:

(ENTER HERE BASED ON DEPARTMENT ASSIGNMENT)

EMPLOYMENT STANDARDS:

Knowledge of –

- Computer systems operations and software;
- Education organization, policies and procedures;
- General office practices, procedures and equipment;
- Proper English usage, grammar, spelling, vocabulary, punctuation;
- Organization of files and records;
- Customer service standards.

Ability to

- Understand and comply with LEA, County, State and Federal procedures, policies and statutes.
- Maintain high degree of confidentiality;
- Respond to routine inquiries;
- Follow oral and written directions;
- Operate modern office equipment, including computers;
- Adapt to changing work demands;
- Manage task priorities to meet deadlines;
- Work under varying degrees of stress;



- Establish and maintain effective working relationships;
- Communicate effectively with tact and courtesy via telephone, computer and in person.

EDUCATION AND EXPERIENCE

Graduation from high school or comparable demonstration of basic competence and preferably four years of progressively responsible secretarial experience. Experience in an education setting is desired but not required.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

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SALARY: Range _____ on the adopted salary scale for classified employees.



SPECIALIST (Template)

JOB SUMMARY

Under the general supervision of the assigned administrator, performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department, and serving as a technical resource to HCOE, school district and charter school staff.

DISTINGUISHING CHARACTERISTICS

This is a high-level position. A Specialist is responsible for the collection, reconciliation and reporting of specialized groups of data. A Specialist works with complex data and performs technical and clerical duties specific to their assigned department. A Specialist serves as a technical resource to HCOE, local school districts and charter schools, preparing and provides training and support in both one-on-one and group settings clearly communicating complex processes.

ESSENTIAL DUTIES:

(ENTER HERE BASED ON DEPARTMENT ASSIGNMENT)



EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Concepts and techniques related to the research, gathering, compiling, auditing and processing of specific sets of data.
- Principles and practices of training and providing work direction as part of a team.
- Applicable sections of California Education Code and other federal and state laws, rules, and regulations.
- Office practices, methods and procedures
- Computer data base systems and computer based systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- Make recommendations regarding improved policies and procedures
- Audit the record keeping work prepared by other school personnel.
- Follow written and oral instructions
- Work independently with little direction
- Prepare, organize and maintain records and files
- Present complex technical information to individuals, small and large groups effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in work flow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

EDUCATION AND EXPERIENCE

- Associate's degree in related field or Business Administration and two (2) years of equivalent related experience, or
- High School Diploma/GED and four (4) years related experience with increasing responsibility in accounting, auditing or financial analysis, with one (1) year in a school district or county office of education preferred.



WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range _____ on the adopted salary scale for classified employees.



TECHNICIAN I (Template)

JOB SUMMARY

Under the supervision of the department manager, a Technician is responsible for data entry and processing within their assigned Department and processing data reports in response to requests. A Technician performs varying degrees of clerical duties and may handle sensitive data.

DISTINGUISHING CHARACTERISTICS

A Technician requires specialized computer/data entry skills enhanced by the knowledge of the terminology, practices and policies of their assigned Department. The position also requires a working knowledge of research and reporting formats, and the ability to exercise considerable independent judgment, discretion, and initiative in order to respond appropriately to typical county and school office situations. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, systems development and records maintenance.

ESSENTIAL DUTIES:

(ENTER HERE BASED ON DEPARTMENT ASSIGNMENT)



EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer data base systems and applicable software

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in work flow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

EDUCATION AND EXPERIENCE

Graduation from high school (diploma or GED) with comparable demonstration of basic competence and three years of experience in keeping or working with department records, including one year of increasing responsibilities related to the field of work.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS



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- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range _____ on the adopted salary scale for classified employees.



TECHNICIAN II (Template)

JOB SUMMARY

Under the general supervision of the assigned administrator, may perform a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position. Individuals who serve as Technician II provide services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

(ENTER HERE BASED ON DEPARTMENT ASSIGNMENT)



EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer database systems and computer-based software systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties

EDUCATION AND EXPERIENCE

Graduation from high school (diploma or GED) with comparable demonstration of basic competence and three years of experience in keeping or working with department records, including one year of increasing responsibilities related to the field of work.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.



OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range _____ on the adopted salary scale for classified employees.

RECOMMENDATION FOR PERSONNEL COMMISSION ACTION

AGENDA ITEM: 5.2.1

DATE OF MEETING: 09/10/2024

JOB TITLE:

NEW *Modified* *Second reading*

Specialized Funding Technician

DEPARTMENT/PROGRAM

Student Programs and Services

BACKGROUND INFORMATION

The division of Student Programs and Services has provided internal programs and to some regard some of our LEA's with technical support for managing the Medi-Cal Administrative Activities (MAA) and the Local Education Activities (LEA). These are programs where staff who are serving students who are Medi-Cal eligible and receiving eligible services bill Medi-Cal. HCOE is then reimbursed for these activities. This work was previously completed by a Special Projects Technician. Now that we have realized the context of the work which this position completes, we endeavor to create a job description suited for the specifics it entails.

RANGE/SALARY

Classified Hourly Range 12

Specialized Funding Technician
Classification: Classified, Technician II

Job Summary

Under the general supervision of the assigned administrator, a Technician II performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

Distinguishing Characteristics

This is a mid-level position which requires consultation and collaboration with the supervisor. Technician II's provide services primarily within the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

Essential Duties

Duties and responsibilities may include, but are not limited to, the following:

- Assisting in the management and evaluation of Medi-Cal Administrative Activities (MAA) and the Local Education Activities (LEA) and Children Youth Behavioral Health Initiative (CYBHI) billing activities;
- Performing data entry, record maintenance and data reconciliation for MAA/LEA programs;
- Supporting the preparation and submission of required reports and documentation;
- Maintaining accurate records to support program evaluation and audits;
- Assisting with the training of district personnel on data entry and reporting procedures;
- Collaborating with other departments to ensure program compliance and data integrity;
- Attending meetings and trainings related to MAA/LEA programs as required;
- Assisting with internal audits and preparation for external audits;
- Performing other duties as assigned.

Employment Standards

Knowledge of:

- Departmental principles and practices;
- Laws and regulations pertaining to specific duties;
- The methods, practices and terminology used in manual, semi-automated and automated departmental reports and data entry;
- Office practices, methods and procedures;
- Computer database systems and applicable software.

Ability to:

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines;
- Analyze information and statistics and prepare reports, specifications and correspondence;
- Make recommendations regarding improving procedures;
- Operate office equipment and specialized software;
- Follow written and oral instructions;
- Work under limited supervision;
- Prepare, organize and maintain records and files;
- Present moderately complex technical information to individuals effectively;
- Professionally represent the office to other schools, businesses and agencies as necessary;
- Adjust to changing work demands including, but not limited to, changes in procedures, technologies and fluctuations in workflow;
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed;
- Establish and maintain effective working relationships with those contacted in the performance of duties;
- Read well enough to read fine print.

Education and Experience

- Graduation from high school (diploma or GED).
- Two years of progressively responsible clerical experience.

Working Conditions

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking and occasional bending, stooping and reaching. The employee must be able to lift, push and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

Other Requirements

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- May be required to obtain first aid and CPR certificates within the first 6 to 12 months of employment.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

Salary: Range 12 on the adopted salary scale for classified employees.

09/04/24

PC Approved:

RECOMMENDATION FOR PERSONNEL COMMISSION ACTION

AGENDA ITEM: 5.3.1

DATE OF MEETING: 09/10/2024

JOB TITLE:

New *Modified* *Second reading*

Holistic Wellness Coach I/II

DEPARTMENT/PROGRAM

Prevention and Intervention Services

BACKGROUND INFORMATION

The Wellness Coach I/II is a state-certified position within the Prevention and Intervention Department, supervised by the Program Manager for Mental Health. This role, established by California's Department of Health Care Access and Information, focuses on providing core prevention and intervention services to promote behavioral health and well-being amongst K-12 students, families and staff in the Humboldt County Office of Education. The position has two levels: Wellness Coach I, an entry-level role requiring an Associate's Degree, and Wellness Coach II, a mid-level position requiring a Bachelor's Degree with additional leadership responsibilities. Both levels work primarily in schools, collaborating with various community organizations, and deliver wellness promotion and education services, including social-emotional learning, mental health literacy and life skills programming.

RANGE/SALARY

Holistic Wellness Coach I: Range 14

Holistic Wellness Coach II: Range: 16

Holistic Wellness Coach I / Holistic Wellness Coach II

Classification: Classified

Job Summary

Supervised by the Program Manager for Mental Health within the Prevention and Intervention Department, the Holistic Wellness Coach (HWC) I/II is a state-certified profession established by California's Department of Health Care Access and Information (HCAI) as part of the Children and Youth Behavioral Health Initiative. The role of the HWC I/II will be to offer core prevention and intervention services that promote behavioral health and well-being in a supportive role with K-12 students, families and staff as part of the Humboldt County Office of Education (HCOE) team. This is a classified 10 month position.

Distinguishing Characteristics

The **Holistic Wellness Coach I** is an entry level position requiring an Associate's Degree and supervised hours. The HWC I will work primarily in schools, as well as Family Resource Centers, Tribal groups and other community agencies. Services may be provided at schools, HCOE offices and within the community.

The **Holistic Wellness Coach II** is a mid-level position that will work primarily in schools and collaborate their efforts with Family Resource Centers, tribal groups and other community agencies. The HWC II, while participating in similar activities as a HWC I, will assume a leadership role both within HCOE and at local school districts by delivery of professional development, and facilitate surveys, focus groups and interviews within school settings to identify needs for programming. Services may be provided at schools, HCOE offices or during home visits.

Essential Duties

Wellness Promotion and Education

Delivers group or classroom programming for school-site staff, students and parents/families focused on social emotional learning competencies including, but not limited to:

- Building positive relationships and bullying prevention;
- Nutrition and exercise in relationship to behavioral health;
- Mental health literacy, including symptom recognition, help-seeking strategies and how to provide support;
- Life skills, including stress management, time management, sleep and hygiene and problem-solving.

(Wellness Coach II additionally provides services with an emphasis on coping skills, including structured problem-solving, distress tolerance, creative expression, distraction strategies and emotional regulation.)

Universal Screening

- Support youth completing social emotional learning screening and behavioral health screenings;
- Identify mental health, wellness and behavioral health needs of youth and collaborate with school-site staff and behavioral health providers in school(s) or community-based organizations.

Care Coordination and Extension

- Connect students, staff and families to school-based and community mental health and wellness related support services and resources;
- Connect students, staff and families to social services, such as public health, food and housing as needed;
- Facilitate communication with school personnel, families, community-based organizations and other mental health and wellness providers that are providing support and care to youth and families;
- Participate in multi-disciplinary meetings with community partners.

Individual and/or Group Support

- Provide check-ins and meetings with students/family that provide emotional and/or mental health support, which may include social-emotional competencies, wellness education and basics of behavioral health symptoms;
- Behavior management to promote academic success;
- Goal setting/planning.

(The Wellness Coach II additionally delivers research-based curriculum in a small-group format for youth or family members focusing on improving awareness of the most common behavioral health conditions in order to increase understanding, reduce stigma and foster a more informed and empathetic community.)

Education, Training and Professional Development

- Support school-based staff in the assessment of training needs for parents, guardians, caregivers and members of the educational team;
- Coordinate the development, design and delivery of mental health and wellness related curriculum and training to students, members of the educational team and family members of students recommended for, or receiving, educationally-based mental health services;
- Provide Tier I/II behavioral, emotional and/or social support for students at school sites.

Employment Standards

Knowledge of:

- Mental health, social emotional and wellness interventions and strategies;
- Program planning and evaluation design and tools;
- Ethics, confidentiality and person-centered service delivery;

- Staff development and professional development resources and the ability to implement them effectively;
- Trauma informed practices, parent-child focused interventions, adverse childhood experiences and secondary trauma.

Ability to:

- Engage with clients and constituents as experts of their own experiences with an emphasis on cultural humility and responsiveness;
- Use empathy, reflection and interpersonal skills to effectively engage diverse clients and constituencies;
- Apply self-awareness and self-regulation to manage the influence of personal biases and values in working with diverse clients and constituencies;
- Work directly with all racial, ethnic, linguistic, disability and socioeconomic groups while maintaining a kind and professional demeanor free of discrimination;
- Demonstrate appropriate poise, tact and sound judgment while coping with a high volume of work and multiple tasks;
- Be flexible and adaptable to changing environments and schedules.

Education and Experience:**Holistic Wellness Coach I**

- Associate's Degree from an accredited college or university in relevant fields, such as social work, human services, addiction studies, psychology, sociology, child development and/or mental health.

Holistic Wellness Coach II

- Bachelor's Degree or higher from an accredited college or university in relevant fields, such as social work, human services, addiction studies, psychology, sociology, child development and/or mental health.

Preferred Experience for both levels I and II:

- Enough field hours completed to become registered as a Wellness Coach I/II, as per state requirements (and willingness to register).
Please see <https://cawellnesscoach.org/> for more information about registration and certification.

Working Conditions

This position will be assigned to an office setting, either in the county Office of Education or at district school sites. The employee will be expected to work closely with other county office staff, district personnel, students, families, other professionals, outside agencies and private partners, in person, via email and on the telephone. Employee will be assigned to schools, home visits or site settings where multiple children, school staff and families are present. Employees may be required to walk, stand or conduct work in outdoor educational

environments where there may be loud students or staff, varied temperatures, public interaction or upset staff or students. The employee will need to frequently perform repetitive hand/finger movements for activities such as, but not limited to, using a keyboard. The employee is occasionally required to climb stairs, bend, reach with hands/arms, lift, stoop, kneel and crouch. The employee may be required to drive long distances to remote areas of the county and may be required to lift and move equipment up to 25 lbs.

Other Requirements

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Must pass a pre-employment physical (if applicable).
- May be required to drive with or without students; some positions may require a California driver's license, proof of insurance and possible participation in the DMV DUI Notice Program once employed.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

Salary:

Holistic Wellness Coach I: Range 14 on the adopted salary scale for classified employees.

Holistic Wellness Coach II: Range 16 on the adopted salary scale for classified employees.

09/2024

PC Approved:

AnalystAdvisor – Human Resources

JOB SUMMARY

Under the direction of the assigned administrator and depending on department, this position performs data processing and fiscal analysis for county office, school districts and/or charter schools; provides technical assistance and support in fiscal, HR and data processing to school districts and/or County Office of Education staff; performs audits of records and expenditures in compliance with California Education Code, GAAP, Federal and State laws and regulations. The Advisor provides leadership, advice and support to the Humboldt County Office of Education (HCOE) and direct service to school district personnel regarding field-related matters from within their assigned department. Ensures that overall policies, practices and/or regulations meet compliance requirements. The Advisor may also be asked to lead or co-lead applicable focused training targeted for HCOE staff and/or all Humboldt County districts and charter schools.

DISTINGUISHING CHARACTERISTICS

This is an advanced-level position which requires independent analysis and decision-making. An analyst provides support and service to HCOE programs, local school districts and charter schools. They analyze various types of data sets including fiscal and demographic. An analyst also reviews data sets provided by Federal and State agencies, HCOE programs, local school districts and/or charter schools utilizing applicable laws, policies and procedures. Additionally, analysts assist others with compiling data and providing guidance to internal and external partners. An Advisor is the highest level of classified work providing leadership to HCOE and District personnel. This position reports to the assigned department supervisor and works under minimal supervision.

ESSENTIAL DUTIES:

- Ensures recruitment efforts are consistent, effective and efficient and follow established HCOE policies.
- Posts and advertises job vacancies as appropriate.
- Conducts initial screening of applicants for classified positions.
- Administrations of leave benefits Administers and analyzes including workers' compensation and statistical and demographic reporting and analysis.
- As part of a team, maintains an efficient system for personnel records including control and storage of documents and files, conversion of files to support computer-aided retrieval and day-to-day record maintenance; periodically

reviews records for completeness and compliance according to HCOE and LEA's established checklists.

- Assists in verification of accuracy of HR transactions in human resource information system.
- May Conducts research and provides information to staff in the following areas: cCompensation, classification, and employee demographics, and other HR-relaed topics.
- May guide and assist human resources personnel at school districts within the county on an as-needed basis.
- Assists HR Director in the creation of queries to select and compile information from the HR system as needed including internal and external records requests.
- Ensures assigned mandated reports are completed and distributed to appropriate governmental agencies or personnel, according to established timelines and procedures.
- Completes employment verifications for current and past employees.
- Assists with trainings for HCOE staff regarding HR topics and processes.
- Assists with HCOE compliance and implementation regarding new laws, policies, and requirements.
-

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EMPLOYMENT STANDARDS:

Knowledge of:

- General HR practices, fair employment practices, and laws regarding leaves and workers compensation.
- Comprehending and composing a variety of documents.
- Facilitating group discussions and analyzing situations to define issues and draw conclusions.
-
- In depth knowledge of human resources information systems.
- Applications of computers, software and data processing.
- Oral and written communication
- Department operations and policies
- Operation of a computer and assigned software
- Creating and modifying electronic spreadsheets, pivot tables and related software.
-

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Ability to:

- ~~Make recommendations regarding improved procedures, including training programs and technologies.~~
- ~~Follow written and oral instructions.~~
- Communicate technical and complex concepts to others having varying levels of understanding, deal with sensitive and complex issues, and convey a positive, service-oriented image of the department.
- ~~Interpret, apply and explain leave programs including workers' compensation to employees.~~
- ~~Organize and maintain confidential records in a manner that ensures ready access and compliance with legal requirements on records retention.~~
- ~~Operate computers, printers and software including personnel systems, leave tracking, word processing, databases and spreadsheets.~~
- ~~Perform complex projects independently and professionally.~~
- ~~Meet schedules and timelines.~~
- ~~Effectively present complex technical information to individuals, small and large groups.~~
- ~~Create databases/spreadsheets, verifying information and entering information onto established data entry screens.~~
- ~~Compute sums, quotients, fractions, percentages, ratios, and other complex calculations.~~
- ~~Develop and write detailed procedures and forms.~~
- ~~Remain calm in stressful situations, listen to complaints and concerns, and resolve issues or refer situations to the appropriate person.~~
- ~~Prioritize work in order to meet multiple, recurring deadlines and maintain schedules.~~
- ~~Work effectively as part of a team devoted to customer care and outstanding service.~~
- ~~Adjust to changing work demands, including but not limited to changes in procedures, technologies and fluctuations in workflow.~~
- ~~Communicate effectively orally and in writing, in both one-on-one and large group settings.~~
- ~~Establish and maintain cooperative and effective working relationships.~~
- ~~Work with computerized data storage and retrieval systems.~~
- ~~Communicate effectively with, and offer technical assistance in specified areas to, district and other management personnel.~~
- Type and 10-key at an acceptable rate of speed.
- Operate standard office equipment using pertinent software applications.
- Perform assigned department procedures.
- Plan and manage projects.
- Prepare and maintain accurate records.
- Audit compliance reports.
- Conduct departmental transactions.
- Work collaboratively and efficiently as part of a departmental team.
- Represent HCOE in the highest professional and ethical standards.

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- Communicate effectively with others within the department, across HCOE and with Districts.
- Schedule activities, meetings, and/or events
- Gather, collate, and/or classify data
- Analyze data utilizing defined but different processes
- Work and communicate with a diversity of individuals and/or groups
- Work with data of varied types and/or purposes
- Problem solve, analyze issues, and create action plans. Problem solving with data requires analysis based on organizational objectives; and problem solving with equipment is moderate.
- Work effectively under time constraints
- Meet deadlines and schedules
- Setting priorities
- Work with detailed information
- Work under limited supervision
-

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- ~~Six (6) years related experience with increasing responsibility in accounting, auditing or financial analysis, with two (2) in a school district or county office of education preferred. Bachelor's degree in a field related to Human Resources/Personnel and four (4) years of related experience~~
OR
- Eight (8) years related experience with increasing responsibility in a field related to Human Resources/Personnel.
- PREFERRED EXPERIENCE:
- Experience working in a school district or county office of education.
-

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

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- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

| **SALARY:** Range ~~18-20~~ on the adopted salary scale for classified employees.



Advisor – Business Support

JOB SUMMARY

The Advisor provides leadership, advice and support to Humboldt County Office of Education (HCOE) direct service school district personnel, regarding field-related matters including budget challenges, compliance issues and interpretation of various governmental codes within their assigned department. Ensures that overall policies, practices and/or regulations meet compliance requirements; maintains accurate records; evaluates the feasibility of services within budget parameters and ensures efficient use of financial resources. The Advisor would also be asked to lead or co-lead applicable focused training targeted for all Humboldt County districts and charter schools.

DISTINGUISHING CHARACTERISTICS

An Advisor is the highest level of classified work providing leadership to HCOE and District personnel. The Advisor is responsible for creating and overseeing processes at the District level and providing leadership, advice and support to HCOE staff and LEAs/Districts. This position reports to the assigned department supervisor and works under minimal supervision.

ESSENTIAL DUTIES:

- Advises HCOE direct service to LEA district personnel for the purpose of aiding all levels of management in the resolution of budget concerns and other financial issues.
- Analyzes financial information related to services (e.g. complex annual budgets, budget models, interim reports, year-to-date and annual data, financial forecasts, grants and entitlements, including special education, etc.) for the purpose of identifying potential budget variances.
- Compiles statistical information, develops procedures and conforms to established financial practices. ~~and regulatory~~
- ~~Assists in the preparation and filing of complex Standardized Account Code Structure (SACS) reports and various other reports for the purpose of preparing the information and data required for all financial reporting periods.~~
- Conducts budget review and financial analysis in regards to FTE, salary projections and budget constraints for the purpose of administering and maintaining position control model for direct service LEAs.



**Humboldt County
Office of Education**

- Coordinates a wide variety of accounting projects for the purpose of providing required guidance and support regarding financial matters, budget concerns, and compliance issues, ~~technical and business~~
- Monitors all business operational duties for the purpose of ensuring the accuracy of reported information, availability of funds and compliance with established financial guidelines and program policies, practices and regulatory requirements.
- Performs all essential duties and responsibilities at both HCOE and at the direct service ~~district~~ sites (e.g. budgeting, payroll, accounts payable, deposits, etc.) for the purpose of meeting district, management and statutory deadlines. ~~and~~
- Prepares and maintains a wide variety of manual and electronic files, documents and records for the purpose of documenting activities, providing reference, conveying information and complying with established financial, legal and/or administrative requirements and statutory deadlines.
- Presents a wide variety of financial and reported information in trainings, workshops and Governing Board meetings for the purpose of communicating information in processes, procedures and systems to various educational partners, including Governing Boards.
- Provides fiscal professional development to new chief business officials.
- Researches financial topics and related legal issues for the purpose of staying informed on legal, economic, financial and regulatory developments that affect districts' income, expenditures, budgeting and financial practices.
- Serves as liaison between direct service districts and various HCOE departments and/or various outside agencies.

EMPLOYMENT STANDARDS:

Knowledge of –

- Advanced math, reading technical information, composing a variety of documents and/or facilitating group discussion and analyzing situations to define issues and draw conclusions.
- Principals of accounting and auditing.
- General applicable governmental codes.
- Standard office practices, methods and procedures
- Data analysis and/or budget analysis.



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Office of Education**

- Proficiency in electronic spreadsheets pivot tables and related software.

Ability to

- Operate standard office equipment using pertinent software applications.
- Perform assigned department procedures.
- Plan and manage projects.
- Prepare and maintain accurate records.
- Audit compliance reports
- Conduct departmental transactions.
- Work collaboratively and efficiently as part of a departmental team.
- Represent HCOE in the highest professional and ethical standards.
- Communicate effectively with others within the department, across HCOE and with Districts.
- Schedule activities, meetings, and/or events
- Gather, collate, and/or classify data
- Analyze data utilizing defined but different processes
- Work and communicate with a diversity of individuals and/or groups
- Work with data of varied types and/or purposes
- Problem solve in order to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives; and problem solving with equipment is moderate.
- Analyze a variety of financial and statistical information
- Work effectively under time constraints
- Meet deadlines and schedules
- Setting priorities
- Work with detailed information
- Work under limited supervision

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Bachelor's degree in related field or Business Administration and four (4) years of related experience, or
- Eight (8) years related experience with increasing responsibility in accounting, auditing or financial analysis, including at least four (4) years in a school district or county office of education.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.



**Humboldt County
Office of Education**

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 20 on the adopted salary scale for classified employees.

HCOE

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CSEA

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ANALYST– EXTERNAL BUDGET AND ACCOUNTING

JOB SUMMARY

Under the direction of the assigned administrator and depending on department, this position performs data processing and fiscal analysis for county office, school districts and/or charter schools; provides technical assistance and support in fiscal, HR and data processing to school districts and/or County Office of Education staff; performs audits of records and expenditures in compliance with California Education Code, GAAP, Federal and State laws and regulations.

DISTINGUISHING CHARACTERISTICS

This is an advanced-level position which requires independent analysis and decision-making. An analyst provides support and service to HCOE programs, local school districts and charter schools. They analyze various types of data sets including fiscal and demographic. An analyst also reviews data sets provided by Federal and State agencies, HCOE programs, local school districts and/or charter schools utilizing applicable laws, policies and procedures. Additionally, analysts assist others with compiling data and providing guidance to internal and external partners.

ESSENTIAL DUTIES:

- Coordinates and assists local education agencies (LEAs) in the preparation of Local Control Accountability Plans (LCAP), adopted budgets and interim reports in accordance with state adopted reporting standards.
- Oversees county office school district fiscal oversight responsibilities under AB 1200 and the Local Control Funding Formula (LCFF) in accordance with current legislation.
- Analyzes and tracks LEAs' fiscal status including cash flow, fund balances, assessment of categorical budgets for fiscal compliance, expenditure controls, revenue and expenditure projections, enrollment trends, capital projects, annual external audits and other types of fiscal stability indicators.
- Assists in researching, interpreting and communicating to LEAs the financial implications of legislation on school district and charter school revenue sources.
- Has the lead responsibility for the analysis of a variety of types of financial projections.
- Maintains a current knowledge of state and federal reporting and compliance regulations as they relate to school district finance.
- Maintains a current knowledge of all state software reporting applications related to school district finance.



Humboldt County Office of Education

- Assists with the design, maintenance and implementation of related accounting systems and software.
- Depending on assigned districts, may be required to understand charter school regulations related to business operations, fiscal indicators, fiscal oversight and financial reporting requirements.
- Assists ~~Chief Business Official (CBO)~~ External Business Manager in providing training and mentoring to school district and county office staff in areas of the Local Control Accountability Plan, budget development, budget updates, and budget monitoring.
- Assists in the preparation of year-end financial reports; assists or prepares reports meeting local, state and federal requirements.
- Leads or assists in conducting workshops which disseminate information regarding state reporting, compliance and software.
- Works with and assists the district and ~~charter county office~~ independent auditors.
- May be required to coordinate contract services for external budget and financial services. ~~and provide support to the Humboldt Del Norte SELPA~~
- Does related work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of –

- Budget and Payroll processing, accounting and administration
- Applications of computers, software and data processing to accounting and payroll
- Accounting principles and procedures
- Budget and Payroll standards and policies
- Bargaining agreements
- Oral and written communication
- Department operations and policies
- Principles and practices of training and providing work direction
- Specialized payroll, tax and account analysis report preparation and statistical record-keeping techniques
- Payroll processes for tax withholding, voluntary deductions, garnishments and supplemental insurance
- Operation of a computer and assigned software

Ability to

- Perform highly responsible and technical accounting, audit and fiscal record management and reporting functions
- Analyze financial data to detect and correct errors



Humboldt County Office of Education

- Make recommendations regarding improved procedures, including training programs and technologies
- Audit the work prepared by other school personnel
- Follow written and oral instructions
- Perform complex projects independently and professionally
- Meet schedules and timelines
- Effectively present complex technical information to individuals, small and large groups
- Adjust to changing work demands, including but not limited to changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing, in both one-on-one and large group settings
- Establish and maintain cooperative and effective working relationships
- Guide the work of partnered department personnel
- Work with computerized accounting and data storage and retrieval systems
- Communicate effectively with, and offer technical assistance in specified areas to, district and other management personnel
- Type and 10-key at an acceptable rate of speed

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Bachelor's degree in related field or Business Administration and two (2) years of equivalent related experience, or
- Six (6) years related experience with increasing responsibility in accounting, auditing or financial analysis, with two (2) in a school district or county office of education preferred.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.



**Humboldt County
Office of Education**

SALARY: Range 18 on the adopted salary scale for classified employees.

HCOE

CSEA

APR 8/1/2024

WYF 8/1/24

Ylley Lina 8/1/2024

J. L. 8/1/2024



ANALYST– INTERNAL BUDGET AND ACCOUNTING

JOB SUMMARY

Under the direction of the assigned administrator and depending on department, this position performs data processing and fiscal analysis for county office, school districts and/or charter schools; provides technical assistance and support in fiscal, HR and data processing to school districts and/or County Office of Education staff; performs audits of records and expenditures in compliance with California Education Code, GAAP, Federal and State laws and regulations.

DISTINGUISHING CHARACTERISTICS

This is an advanced-level position which requires independent analysis and decision-making. An analyst provides support and service to HCOE programs, local school districts and charter schools. They analyze various types of data sets including fiscal and demographic. An analyst also reviews data sets provided by Federal and State agencies, HCOE programs, local school districts and/or charter schools utilizing applicable laws, policies and procedures. Additionally, analysts assist others with compiling data and providing guidance to internal and external partners.

ESSENTIAL DUTIES:

- Coordinates and assists **County Office of Education (COE)** ~~local education agencies (LEAs)~~ in the preparation of Local Control Accountability Plans (LCAP), adopted budgets and interim reports in accordance with state adopted reporting standards.
- ~~Oversees county office school district fiscal oversight responsibilities under AB 1200 and the Local Control Funding Formula (LCFF) in accordance with current legislation.~~
- ~~Analyzes and tracks LEAs' fiscal status including cash flow, fund balances, assessment of categorical budgets for fiscal compliance, expenditure controls, revenue and expenditure projections, enrollment trends, capital projects, annual external audits and other types of fiscal stability indicators.~~
- Assists in researching, interpreting and communicating to **COE budget staff** ~~LEAs~~ the financial implications of legislation on **county office** ~~school district and charter school~~ revenue sources.
- Has the lead responsibility for the analysis of a variety of types of financial projections.
- Maintains a current knowledge of state and federal reporting and compliance regulations as they relate to ~~school district~~ finance.



Humboldt County Office of Education

- Maintains a current knowledge of all state software reporting applications related to school district finance.
- Assists with the design, maintenance and implementation of related accounting systems and software.
- ~~Depending on assigned districts, may be required to understand charter school regulations related to business operations, fiscal indicators, fiscal oversight and financial reporting requirements.~~
- Assists Chief Business Official (CBO) **Internal Business Manager** in providing training and mentoring to school district and county office staff in areas of the Local Control Accountability Plan, budget development, budget updates, and budget monitoring.
- Assists in the preparation of year-end financial reports; assists or prepares reports meeting local, state and federal requirements.
- ~~Leads or assists in conducting workshops which disseminate information regarding state reporting, compliance and software.~~
- Works with and assists the district and county office independent auditors.
- ~~May be required to coordinate contract services for external budget and financial services. and provide support to the Humboldt Del Norte SELPA~~
- Does related work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of –

- Budget and Payroll processing, accounting and administration
- Applications of computers, software and data processing to accounting and payroll
- Accounting principles and procedures
- Budget and Payroll standards and policies
- Bargaining agreements
- Oral and written communication
- Department operations and policies
- Principles and practices of training and providing work direction
- Specialized payroll, tax and account analysis report preparation and statistical record-keeping techniques
- Payroll processes for tax withholding, voluntary deductions, garnishments and supplemental insurance
- Operation of a computer and assigned software

Ability to

- Perform highly responsible and technical accounting, audit and fiscal record management and reporting functions



Humboldt County Office of Education

- Analyze financial data to detect and correct errors
- Make recommendations regarding improved procedures, including training programs and technologies
- Audit the work prepared by other school personnel
- Follow written and oral instructions
- Perform complex projects independently and professionally
- Meet schedules and timelines
- Effectively present complex technical information to individuals, small and large groups
- Adjust to changing work demands, including but not limited to changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing, in both one-on-one and large group settings
- Establish and maintain cooperative and effective working relationships
- Guide the work of partnered department personnel
- Work with computerized accounting and data storage and retrieval systems
- Communicate effectively with, and offer technical assistance in specified areas to, district and other management personnel
- Type and 10-key at an acceptable rate of speed

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Bachelor's degree in related field or Business Administration and two (2) years of equivalent related experience, or
- Six (6) years related experience with increasing responsibility in accounting, auditing or financial analysis, with two (2) in a school district or county office of education preferred.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.



**Humboldt County
Office of Education**

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 18 on the adopted salary scale for classified employees.

HCOE

Alida 8/1/2024

WYA 8/1/24

CSEA

Shelley Lewis 8/1/2024
JL 8/1/2024



Analyst - Payroll

JOB SUMMARY

Under the direction of the assigned administrator and depending on department, this position performs data processing and fiscal analysis for county office, school districts and/or charter schools; provides technical assistance and support in fiscal, HR and data processing to school districts and/or County Office of Education staff; performs audits of records and expenditures in compliance with California Education Code, GAAP, Federal and State laws and regulations.

DISTINGUISHING CHARACTERISTICS

This is an advanced-level position which requires independent analysis and decision-making. An analyst provides support and service to HCOE programs, local school districts and charter schools. They analyze various types of data sets including fiscal and demographic. An analyst also reviews data sets provided by Federal and State agencies, HCOE programs, local school districts and/or charter schools utilizing applicable laws, policies and procedures. Additionally, analysts assist others with compiling data and providing guidance to internal and external partners.

ESSENTIAL DUTIES:

- Performs analysis functions for payroll processing and accounting for county-wide payroll; identifies discrepancies, makes adjustments and resolves problems;
- Analyzes payroll processes for compliance on payroll retirement rules, payroll tax liability, state and federal regulations, education and labor code, policies and procedures related to LEA payroll reporting and processing;
- Analyzes TSA's, payroll vendors, OASDI, MEDI and SDI on each payroll run;
- Reconciles and remits payment to third-party TSA administrator;
- Provides technical assistance and training to the school districts, charter schools and HCOE staff on applicable payroll and accounting functions;
- Participates in the creation and update of operating, instruction and procedural manuals;
- Establishes procedures for timely and accurate payments of quarterly payroll taxes and government reporting;
- Participates in in-service training and workshops;
- Establishes and maintains TSA vendor list for all school districts and county offices; ensures compliance of districts and vendors with 403b and 457b state and federal laws and regulations;



Humboldt County Office of Education

- Prepares and balances various payroll & payroll labor reports to ensure proper reporting for annual and quarterly state and federal statutory taxes;
- Prepares and balances all necessary payroll labor reports as required for submission to various state and federal government agencies, as necessary;
- **Balances payroll tax and TSA accounts, researches discrepancies and works with LEA's to resolve;**
- Investigates, analyzes and responds to notices and reports from various regulatory, tax and pensioning agencies regarding account discrepancies; performs complex research to correct discrepancies;
- **Provides backup and support for Payroll Auditor.**

EMPLOYMENT STANDARDS:

Knowledge of –

- Payroll processing, accounting and administration
- Applications of computers, software and data processing to accounting and payroll
- Accounting principles and procedures
- Payroll standards and policies
- Bargaining agreements
- Oral and written communication
- Department operations and policies
- Principles and practices of training and providing work direction
- Specialized payroll, tax and account analysis report preparation and statistical record-keeping techniques
- Payroll processes for tax withholding, voluntary deductions, garnishments and supplemental insurance
- Operation of a computer and assigned software

Ability to -

- Perform highly responsible and technical accounting, audit and fiscal record management and reporting functions
- Analyze financial data to detect and correct errors
- Make recommendations regarding improved procedures, including training programs and technologies
- Audit the work prepared by other school personnel
- Follow written and oral instructions
- Perform complex projects independently and professionally
- Meet schedules and timelines



**Humboldt County
Office of Education**

- Effectively present complex technical information to individuals, small and large groups
- Adjust to changing work demands, including but not limited to changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing, in both one-on-one and large group settings
- Establish and maintain cooperative and effective working relationships
- Guide the work of partnered department personnel
- Work with computerized accounting and data storage and retrieval systems
- Communicate effectively with, and offer technical assistance in specified areas to, district and other management personnel

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Bachelor’s degree in related field or Business Administration and two (2) years of equivalent related experience, or
- Six (6) years related experience with increasing responsibility in accounting, auditing or financial analysis, with two (2) in a school district or county office of education preferred.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 188 on the adopted salary scale for classified employees.

HCOE

CSEA

A.P. [Signature] 8/1/2024

[Signature] 8/1/24

Sherry Lucia 8/1/2024
[Signature] 8/1/2024



SPECIALIST - RETIREMENT

JOB SUMMARY

Under the general supervision of the assigned administrator, performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department, and serving as a technical resource to HCOE, school district and charter school staff.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires independent decision-making. A Specialist is responsible for the collection, reconciliation and reporting of specialized groups of data. A Specialist works with complex data and performs technical and clerical duties specific to their assigned department. A Specialist serves as a technical resource to HCOE, local school districts and charter schools, preparing and provides training and support in both one-on-one and group settings clearly communicating complex processes.

ESSENTIAL DUTIES:

- Audits STRS and PERS monthly retirement reports submitted by Humboldt County education agencies for the purpose of reconciling, consolidating and submitting combined reports to STRS and PERS.
- Compiles, reviews, and prepares financial analyses (e.g., year-end reports, variance reports, contribution rates, etc.) for the purpose of providing financial summaries for staff and educational agency use, and/or ensuring compliance with established regulatory guidelines.
- Creates, interprets and coordinates updates to operating, instruction and procedures manuals for the purpose of providing direction in addressing needs and resolving current issues.
- Develops and conducts individual and group workshops and/or training for Humboldt educational agencies for the purpose of conveying knowledge of retirement system regulations, proper recordkeeping procedures and reporting requirements.
- Ensures the timeliness and accuracy of payments for retirement reporting for the purpose of assuring compliance with state guidelines and retention of information required by law.
- Operates internal retirement information systems for the purpose of providing required guidance, support and compliance with established regulations.
- Participates in unit meetings, in-service training, workshops, etc. for the purpose of conveying and/or gathering information required to perform job functions.
- Prepares and maintains a wide variety of files and records (e.g., variance and activity reports, payroll records, retirement records, accounting records, state mandated



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Office of Education**

reports, procedures, etc.) for the purpose of documenting activities, providing reference, conveying information, and complying with established financial, legal and/or administrative requirements.

- Receives PERS and STRS agencies procedural changes for the purpose of implementing these changes in compliance with established regulatory guidelines.
- Reconciles, balances, tracks and maintains records for the purpose of verifying accuracy of information, maintaining accurate balances according to prescribed accounting procedures.
- Resolves discrepancies and exceptions related to retirement reporting issues for the purpose of investigating and working independently with local educational agencies ensuring legality, proper authorization and compliance with relevant legal, procedural and reporting requirements.
- Responds to inquiries of staff and administration for the purpose of providing routine and specialized information regarding retirement financial procedures.
- Serves as a technical resource to active employees and retirees for the purpose of providing information regarding retirement system matters.
- Verifies and processes cash journal transfers for the purpose of maintaining estimated and final retirement contribution amounts for Humboldt County educational agencies.
- Performs related duties as required.

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Concepts and techniques related to the research, gathering, compiling, auditing and processing of specific sets of data.
- Principles and practices of training and providing work direction as part of a team.
- Applicable sections of California Education Code and other federal and state laws, rules, and regulations.
- Office practices, methods and procedures
- Computer data base systems and computer based systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- Make recommendations regarding improved policies and procedures



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- Audit the record keeping work prepared by other school personnel.
- Follow written and oral instructions
- Work independently with little direction
- Prepare, organize and maintain records and files
- Present complex technical information to individuals, small and large groups effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in work flow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Associate's degree in related field or Business Administration and two (2) years of equivalent related experience, or
- High School Diploma/GED and four (4) years related experience with increasing responsibility in accounting, auditing or financial analysis, with one (1) year in a school district or county office of education preferred.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.



**Humboldt County
Office of Education**

SALARY: Range 15 on the adopted salary scale for classified employees.

For HCOE

[Signature] 8/1/2024

[Signature] 8/1/24

For CSEA

[Signature] 8/1/2024

[Signature] 8/1/2024



TECHNICIAN I – ACCOUNTS PAYABLE AND RECEIVABLE

JOB SUMMARY

Under the supervision of the department manager, a Technician is responsible for data entry and processing within their assigned Department and processing data reports in response to requests. A Technician performs varying degrees of clerical duties and may handle sensitive data.

DISTINGUISHING CHARACTERISTICS

This is an entry-level position. A Technician requires specialized computer/data entry skills enhanced by the knowledge of the terminology, practices and policies of their assigned Department. The position also requires a working knowledge of research and reporting formats and the ability to exercise judgment, discretion, and initiative to respond appropriately to typical county and school office situations. Responsibilities may include administrative support, assisting in systems development, and records maintenance.

ESSENTIAL DUTIES:

- Carries responsibility for an assigned specialized function or a complex phase of a unit to accomplish accounting;
- Gathers, checks, posts, extends, balances, tabulates and proofreads accounting, statistical, or financial reports and data; maintains files, audits and adjusts pertinent source documents, records, worksheets, and reports; makes arithmetical computations and reviews transactions for arithmetic correctness and compliance with legal requirements;
- Prepares monthly, quarterly, semiannual and annual reports; may train other personnel;
- Provides information to and seeks information from other County Office employees, school, district personnel, State, Federal and County representatives, vendors, and the public;
- Operates a variety of office machines including computers, calculators, and copy/fax machines.

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.



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- Office practices, methods and procedures
- Computer data base systems and applicable software

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED) or;
- Two years of progressively responsible clerical experience

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.



**Humboldt County
Office of Education**

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 9 on the adopted salary scale for classified employees.

HCOE

WPA 8/1/2024

WPA 8/1/24

CSEA

Sherry Luma 8/1/2024

JL 8/1/2024



TECHNICIAN II – ACCOUNTS PAYABLE AND RECEIVABLE AUDITOR

JOB SUMMARY

Under the general supervision of the assigned administrator, performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires consultation and collaboration with supervisor. It provides services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

- Audits and reviews HCOE and LEA's accounts payable batches on a regular basis
- Works with HCOE and LEAs to correct identified errors
- Processes and distributes HCOE and LEA's accounts payable batches
- Assists LEAs in 1099 process
- Reviews and produces 1099 forms for all LEAs
- Audits and posts district deposits
- Process & replenish Petty Cash & Revolving Checks for HCOE
- Reconcile accounts payable and deposit ledgers with supporting documents.
- Provides training on accounts payable and deposit processes for HCOE and LEA staff
- Presents materials on accounts payable and deposits at fiscal and calendar year end workshops

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices



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- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer database systems and computer-based software systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED)
- Two years of progressively responsible clerical experience

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.



**Humboldt County
Office of Education**

- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 12 on the adopted salary scale for classified employees.

For HOE

[Signature] 8/1/2024

[Signature] 8/1/24

For CSEA

[Signature] 8/1/2024

[Signature] 8/1/2024



TECHNICIAN II - BUDGET

JOB SUMMARY

Under the general supervision of the assigned administrator, performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires consultation and collaboration with supervisor. It provides services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

- Assumes lead responsibility for an assigned specialized function or a complex accounting unit;
- Gathers, checks, posts, ~~extends~~, balances, ~~tabulates~~ and proofreads accounting, statistical, or financial reports and data;
- Performs auditing functions over other department accounting information;
- Maintains and develops files, audits and sorts documents, records, worksheets, and reports;
- Makes arithmetical computations and reviews transactions for arithmetic correctness and compliance with legal requirements;
- Prepares complex monthly, quarterly, semiannual and annual reports;
- ~~Assigns~~, Trains ~~or leads~~ other personnel;
- Provides information to and seeks information from other county office employees, ~~personnel~~, LEAs, state, federal and county representatives, vendors, and the public;
- Utilizes a variety of standard office equipment including computers and may be required to develop customized spreadsheets using proprietary or public domain accounting software.

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties



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- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer database systems and computer-based systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED)
- Two years of progressively responsible clerical experience

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.



**Humboldt County
Office of Education**

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 12 on the adopted salary scale for classified employees.

HCOE

WPA 8/1/2024

WPA 8/1/24

CSEA

Shelly Lewis 8/1/2024

JL 8/1/2024



TECHNICIAN II - PURCHASER

JOB SUMMARY

Under the general supervision of the assigned administrator, may perform a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires consultation and collaboration with supervisor. It provide services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

- Receives and reviews purchase requests and prepares purchase orders for all departments within HCOE
- Serves as liaison with vendors and suppliers.
- Facilitates cooperative buying activities internally and with local districts.
- Prepares bid specifications and contracts and coordinates bid proceedings.
- Develops the system for and maintains capital assets inventory; supervises central store activity; conducts in person and online investigation of products and materials.
- Investigates procurement complaints; evaluates various office functions and equipment and makes recommendations related to cost savings; supervises repair contract work.
- Prepares and maintains the written administrative procedures involving contracted services, contracts, bids, and purchase orders.

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.



Humboldt County Office of Education

- Office practices, methods and procedures
- Computer database systems and computer-based software systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED)
- Two years of progressively responsible clerical experience

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.



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The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 12 on the adopted salary scale for classified employees.

HCOE

[Signature] 8/1/2024

[Signature] 8/1/24

CSEA

[Signature] 8/1/2024
[Signature] 8/1/2024



TECHNICIAN II – DISTRICT SUPPORT

JOB SUMMARY

Under the general supervision of the assigned administrator, may perform a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires consultation and collaboration with supervisor. It provides services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

- Assumes lead responsibility for an assigned specialized function or a complex accounting unit;
- Gathers, checks, posts, extends, balances, tabulates and proofreads accounting, statistical, or financial reports and data;
- Performs auditing functions over other department accounting information;
- Maintains and develops files, audits and sorts documents, records, worksheets, and reports;
- Prepares complex monthly, quarterly, semiannual and annual reports;
- Reviews, defines and communicates system issues;
- ~~Assigns, trains or leads other personnel;~~
- Provides information to and seeks information from other county office employees, school district personnel, state, federal and county representatives, vendors, and the public;
- Utilizes a variety of technologies and may be required to develop customized spreadsheets using proprietary or public domain accounting software;
- Consults with software providers for program support; functions as software liaison for user support; collaborates with others in reviewing software needs or design;
- Provides user training for various software applications;
- Makes arithmetical computations and reviews transactions for arithmetic correctness and compliance with legal requirements;



EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer database systems and computer-based systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED)
- Two years of progressively responsible clerical experience

WORKING CONDITIONS



**Humboldt County
Office of Education**

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 12 on the adopted salary scale for classified employees.

For HCOE:

Phil Ch 8/1/2024
WJF 8/1/24

For CSEA

Shelley Lewis 8/1/2024
[Signature] 8/1/2024



**TECHNICIAN II
HCOE Payroll**

JOB SUMMARY

Under the general supervision of the assigned administrator, may perform a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires consultation and collaboration with supervisor. It provide services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

- **Coordinates, audits and processes the payroll for HCOE; identifies discrepancies, makes adjustments and resolves problems at the technical level;**
- **Tabulates and maintains balances of banked employee leaves; computes and adjusts banked employee leaves according to employee attendance reports;**
- **Reviews internal payroll for compliance with retirement rules, state and federal regulations, education and labor code, policies and procedures related to HCOE payroll processing and reporting;**
- **Provides technical assistance or training to departmental payroll staff, school districts and charter schools;**
- **Participates in the creation and update of applicable operating, instructional and procedural manuals;**
- **Follows established procedures for and ensures timely reporting and accurate payments of quarterly payroll taxes, annual tax returns and W-2/W-2C, and government statistical reporting (Multiple Worksite Reporting, Affordable Care Act, etc.);**
- **Confers with departmental payroll staff on payroll processing, systems and procedures;**
- **Reconciles payroll transactions and records;**
- **Monitors automated payroll systems;**



**Humboldt County
Office of Education**

- Reviews collective bargaining unit agreements for proper accrual of banked leave;
- Participates in in-service training workshops;
- Establishes and maintains accounting and payroll records per regulations;
- Serve as a resource to HCOE employees regarding payroll, tax and retirement-related matters;
- Research and respond to notices and reports from various regulatory and tax agencies regarding internal payroll account discrepancies;
- Review and process all payroll levies and garnishments for internal employees; correspond with government, legal agencies and employees regarding garnishment orders;

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer database systems and computer-based systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary



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Office of Education**

- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED)
- Two years of progressively responsible clerical experience

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 12 on the adopted salary scale for classified employees.

For HCOE:

Aleda 8/1/2024

WYF 8/1/24

For CSEA:

Theresa Rucie 8/1/2024

Jeanette 8/1/2024



TECHNICIAN II - Payroll Auditor

JOB SUMMARY

Under the general supervision of the assigned administrator, may perform a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires consultation and collaboration with supervisor. It provides services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

- Payroll auditing of all cycles, maintain and update certification log, organize and hand out payroll, all assigned payroll tasks according to the payroll checklists;
- Running processes for cancelling, voiding, reversing, reprocessing and replacing lost checks;
- Calculating, filing and paying payroll taxes for payroll runs;
- Compile and review LEA quarterly EDD payroll filings for SUI, etc.;
- Garnishment coordination and follow-up;
- Payroll vendor maintenance;
- AddOn, Contribution and Deduction maintenance;
- Processes payroll adjustments as needed, and maintains progress and tracking applications;
- Payroll rate maintenance; work with JPA on Worker's Compensation liability and rates;
- Compile and review W-2 checklists and provide assistance as necessary;
- ACA assistance as necessary;
- Coordinate with Accounting Specialist on transfers and backup;
- Monitor US Bank for ACH returns and communicate with Treasurer on those items;
- Miscellaneous records requests;
- Monitor PUG group, Payroll Services email and Escape Help email for questions to respond to;
- Update payroll calendars and due dates – send to districts and maintain in Escape;
- Assist with Fiscal YE and Calendar YE workshops;



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- WC/SDI deposits to payroll record reconciliation
- Keep up on tax laws and tax credits

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer database systems and computer-based software systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in workflow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED)
- Two years of progressively responsible clerical experience



**Humboldt County
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WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 12 on the adopted salary scale for classified employees.

For HCOE:

Child 8/1/2024

WJF 8/1/24

FOR CSEA

Thy Lewis 8/1/2024

J. J. J. 8/1/2024



SPECIALIST - ACCOUNTING

JOB SUMMARY

Under the general supervision of the assigned administrator, performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department, and serving as a technical resource to HCOE, school district and charter school staff.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires independent decision-making. A Specialist is responsible for the collection, reconciliation and reporting of specialized groups of data. A Specialist works with complex data and performs technical and clerical duties specific to their assigned department. A Specialist serves as a technical resource to HCOE, local school districts and charter schools, preparing and provides training and support in both one-on-one and group settings clearly communicating complex processes.

ESSENTIAL DUTIES:

- Assumes the lead responsibility for a complex accounting unit;
- Gathers, audits, posts, reconciles and proofreads accounting, statistical, or financial reports and data;
- Performs auditing functions over school district and department accounting information;
- Maintains and develops files and procedures, audits documents, records, worksheets and reports;
- Reviews transactions for compliance with state accounting rules, as well as legal requirements;
- Reconciles county cash accounts;
- Performs year-end closing functions;
- Prepares complex monthly, quarterly, semi-annual and annual reports;
- ~~Assigns~~, trains or ~~leads~~ other personnel;
- Provides guidance, training and technical support to school district fiscal support staff;
- Provides information to, and seeks information from, other county office employees, school ~~district~~ personnel, auditors, state, federal and county representatives, vendors, and the public;
- Utilizes a variety of technologies and may be required to develop customized spreadsheets using proprietary or public domain accounting software;
- Assists in design, maintenance and implementation of accounting software for the purpose of meeting user needs;
- Assists in coordinating the work of the unit in the absence of the Accounting and ~~Operations~~ Manager.



EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Concepts and techniques related to the research, gathering, compiling, auditing and processing of specific sets of data.
- Principles and practices of training and providing work direction as part of a team.
- Applicable sections of California Education Code and other federal and state laws, rules, and regulations.
- Office practices, methods and procedures
- Computer data base systems and computer based systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- Make recommendations regarding improved policies and procedures
- Audit the record keeping work prepared by other school personnel.
- Follow written and oral instructions
- Work independently with little direction
- Prepare, organize and maintain records and files
- Present complex technical information to individuals, small and large groups effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in work flow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE



**Humboldt County
Office of Education**

- Associate's degree in related field or Business Administration and two (2) years of equivalent related experience, or
- High School Diploma/GED and four (4) years related experience with increasing responsibility in accounting, auditing or financial analysis, with one (1) year in a school district or county office of education preferred.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 15 on the adopted salary scale for classified employees.

HCOE

April 8/1/2024

[Signature] 8/1/24

CSEA

Shelly Luna 8/1/2024
[Signature] 8/1/2024

HUMAN RESOURCES SPECIALIST

JOB SUMMARY

Under the general supervision of the assigned administrator, performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department, and serving as a technical resource to HCOE, school district and charter school staff.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires independent decision-making. A Specialist is responsible for the collection, reconciliation and reporting of specialized groups of data. A Specialist works with complex data and performs technical and clerical duties specific to their assigned department. A Specialist serves as a technical resource to HCOE, local school districts and charter schools, preparing and provides training and support in both one-on-one and group settings clearly communicating complex processes.

ESSENTIAL DUTIES:

- Performs complex technical data management duties in support of employee assignment and position control, health and welfare benefits programs and services within the human resources information system
- Coordinates with HR Director in the review and preparation of new employee documentation; inputs vacant positions in assigned software.
- Receives new HCOE employment paperwork in order to input/attach new employee in assigned software and begin construction for the personnel file. Determines eligibility for new and continuing benefit program participants.
- Verifies and enters HR transaction information into the HR information system, records changes in work hours, classification and pay, job assignment, group benefits, retirement, seniority dates and demographics information.
- Enters information that supports position control, verifies that information for each employee matches a position number
- Serves as an informational resource to HCOE personnel regarding employee benefits
- Issues HR Director approved notices of employment to employees
- Serves as a Custodian of Record in accordance with DOJ/ FBI regulations. Updates HCOE fingerprint consortium
- Provides orientation to new employees
- Responds to inquiries and provide information concerning benefits coverage, changes, policies and timelines
- Receives, processes, reviews for accuracy and evaluates employee enrollment and a variety of other forms and applications
- Explains and assists employees with completing a variety of enrollment forms
- As part of a team, maintains an efficient system for personnel records including control and storage of documents and files, conversion of files to support computer-aided

retrieval and day-to-day record maintenance; periodically reviews records for completeness and compliance according to LEA's established checklists.

- Prepares appropriate reports for the Director of HR in response to relevant and necessary information requests
- Calculates and reports HCOE certificated/classified professional growth submissions
- Maintains HCOE certificated/classified seniority list
- Assigns and monitors mandated trainings
- Prepares reports for the Employment Development Department (EDD), American Fidelity, CSEA, and CTA
- Maintains database on employee evaluations and communicates with Managers
- Verifies accuracy of input and output data
- Operates a variety of office equipment
- Attends and participates in a variety of special events related to assigned activities such as training workshops including conducting training as assigned
- Completes surveys and reports as directed.

EMPLOYMENT STANDARDS:

Knowledge of –

- Departmental principles and practices
- Concepts and techniques related to the research, gathering, compiling, auditing and processing of specific sets of data.
- Principles and practices of training and providing work direction as part of a team.
- Applicable sections of California Education Code and other federal and state laws, rules, and regulations.
- Office practices, methods and procedures
- Computer data base systems and computer based systems.

Ability to

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- Make recommendations regarding improved policies and procedures
- Audit the record keeping work prepared by other school personnel.
- Follow written and oral instructions
- Work independently with little direction
- Prepare, organize and maintain records and files
- Present complex technical information to individuals, small and large groups effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary

- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in work flow
- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties
- Read well enough to read fine print

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Bachelor's degree in related field or Business Administration and two (2) years of equivalent related experience, or
- Six (6) years related experience with increasing responsibility in accounting, auditing or financial analysis, with two (2) in a school district or county office of education preferred.

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by HCOE prior to employment.
- TB testing and/or risk assessment will be required upon employment.
- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 15 on the adopted salary scale for classified employees.

For HCOE:

For CSEA

[Signature] 8/1/24

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[Signature] 8/1/2024

TECHNICIAN II- Credentialing

JOB SUMMARY

Under the general supervision of the assigned administrator, performs a variety of complex clerical, data processing and/or technical accounting work involved in developing, maintaining and auditing data sets specific to their department.

DISTINGUISHING CHARACTERISTICS

This is a mid-level position which requires consultation and collaboration with supervisor. It provide services primarily in the office. Problem solving and the ability to communicate effectively in writing, the capacity to maintain personal demeanor during periods of peak workflow and perform efficiently within restricted time frames are critical factors for success in this position. This job is distinguished by its administrative support expertise in data systems and reporting. Activities may include, but are not limited to, site and administrative support, system development and records maintenance.

ESSENTIAL DUTIES:

- Serves as a credentialing resource for the Human Resources department, district superintendents and the community. Also serves as a connection to Department of Justice (DOJ), California Commission on Teacher Credentialing (CCTC), California Department of Education, institutes of higher education, school districts, public agencies, HCOE staff and the general public.
- Explains and guides potential credential holders in application procedures for various credentials.
- Guides interested parties in filling out paperwork related to 30-day Substitute/Prospective Substitute Permits and makes recommendations to the CCTC.
- Guides interested parties in filling out paperwork related to Short Term Staffing/Provisional Internship Permits and Teaching Permits for Statutory Leave and makes recommendations for the permits to the CCTC.
- Serves as the point of contact for the HCOE Countywide Substitute Consortium including, but not limited to, hosting the orientations, sub evaluations, discipline, removal of subs from the Countywide Sub Consortium and onboarding the substitutes.
- Conducts credential audits in Escape and addresses pay holds.
- Monitors credential assignments for the districts and HCOE on a scheduled basis and assists in resolving any deficiencies.
- Assists in the state mandated county-wide Credential Assignment Monitoring (known as Cal-SAAS).
- Provides credential updates for all districts each month in regard to expirations and pay holds.
- Interacts with data held within a proprietary database related to personnel.

- Maintains files and takes appropriate action with records, such as Notice of Delay and All Points Bulletin received from the DOJ for all certificated personnel in the County.
- Prepares special or routine reports for the County Superintendent or designee as assigned.
- Maintains an up-to-date knowledge of credential requirements and procedures.
- Attends conferences and workshops to stay current with CCTC requirements.
- Serves as the custodian of the HCOE Live Scan Consortium database in accordance with DOJ/FBI regulations
- Maintains up to date credentialing information for districts and individuals, including conducting workshops, preparing and disseminating handouts.
- Establishes and maintains a positive working relationship with the CCTC, school districts and individuals.
- Collaborates with the Human Resource Department to ensure excellent customer service.

EMPLOYMENT STANDARDS:

Knowledge of:

- Departmental principles and practices
- Laws and regulations pertaining to specific duties
- The methods, practices and terminology used in manual, semi-automated, and automated departmental reports and data entry.
- Office practices, methods and procedures
- Computer database systems and computer-based software systems.
- Working knowledge of credentialing procedures, laws, regulations and requirements;

Ability to:

- Prepare, process and verify data and report information rapidly and accurately at an acceptable standard of efficiency and to meet assigned timelines
- Analyze information and statistics and prepare reports, specifications, and correspondence
- May make recommendations regarding improved procedures
- Operate office equipment and specialized software
- Follow written and oral instructions
- Work under limited supervision
- Prepare, organize and maintain records and files
- Present moderately complex technical information to individuals effectively.
- Professionally represent the office to other schools, businesses and agencies as necessary
- Adjust to changing work demands, including but not limited to: changes in procedures, technologies and fluctuations in work flow

- Communicate effectively orally and in writing and one-on-one in scheduled online meetings as needed
- Establish and maintain effective working relationships with those contacted in the performance of duties

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

- Graduation from high school (diploma or GED)
- Two years of progressively responsible clerical experience

WORKING CONDITIONS

With or without accommodation, this position includes prolonged periods of standing or sitting, frequent walking, and occasional bending, stooping, and reaching. The employee must be able to lift, push, and pull objects up to 30 pounds. Visual and auditory abilities are required to perform essential job functions.

OTHER REQUIREMENTS

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- Other requirements as appropriate for the job responsibilities.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

SALARY: Range 12 on the adopted salary scale for classified employees.

~~HCOE~~ ^{For} HCOE :

For CSEA

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