

City and County of San Francisco
Carol Isen
Human Resources Director



Department of Human Resources
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**NOTICE OF FINAL ACTION TAKEN BY THE
HUMAN RESOURCES DIRECTOR**

Date: August 01, 2023

Re: **Notice of Proposed Classification Actions – Final Notice No. 4 FY 2023/2024 (copy attached).**

In the absence of requests to meet addressed to the Human Resources Director, the classification actions contained in the above referenced notice became effective August 01, 2023.

Carol Isen
Human Resources Director

by:

Steve Ponder
Classification and Compensation Director
Human Resources

cc: All Employee Organizations
All Departmental Personnel Officers
DHR – Class and Comp Unit
DHR – Client Services Unit
DHR – Employee Relations Unit
DHR – Recruitment and Assessment Unit
DHR – Client Services Operations
Carol Isen, DHR
Sandra Eng, CSC
Erik Rapoport, SFERS
Theresa Kao, Controller/ Budget Division
E-File

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR**

The following actions are being posted in accordance with Civil Service Rule 109. In the absence of a protest addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 4
Fiscal Year: 2023/2024
Posted Date: 07/25/2023
Reposted Date: N/A

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Job specification(s) attached)

Item #	Job Code	Title
1	1840	Junior Management Assistant
2	1842	Management Assistant
3	1844	Senior Management Assistant

Protests on an item should be addressed to the Human Resources Director and can be submitted by mail to the City and County of San Francisco, Department of Human Resources, 1 South Van Ness Ave, 4th Floor, San Francisco, CA 94103 or by email to DHR.ClassificationActionPostings@sfgov.org. All protests must be received in writing no later than close of business seven (7) calendar days from the posting date, and must include the posting and item number(s), the basis on which the protest is submitted and identify the affected parties.

Copies of this notice may be obtained from the Department of Human Resources or from the website at: <http://sfdhr.org/index.aspx?page=109>. Copies of Civil Service Rule 109 may be obtained from the Department of Human Resources, the office of the Civil Service Commission at 25 Van Ness Ave, Suite 720, San Francisco, CA 94102 or from the website at: [Rule 109 Position Classification and Related Rules | Civil Service Commission](#).

cc: All Employee Organizations
All Departmental Personnel Officers
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**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Junior Management Assistant
Job Code: 1840**

DEFINITION

Under supervision, the Junior Management Assistant, performs general administrative and/or management functions with rotating assignments.

DISTINGUISHING FEATURES

The 1840 Junior Management Assistant is the entry-level class in the Management Assistant Series. The 1840 Junior Management Assistant is distinguished from the 1842 Management Assistant in that the latter performs more difficult and responsible tasks than those assigned to incumbents in this job code.

SUPERVISION EXERCISED

May supervise clerical and technical staff.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Performs administrative and/or management functions in the areas of operations, budget, contract/grant development and/or office management/support services by planning, coordinating, supervising and/or evaluating the activities of assigned staff in order to accomplish departmental goals.
2. Assists in the preparation of fiscal reports by monitoring expenditures and maintaining budget within the organizational goals and projections; reconciling accounts, performing financial analysis, gathering information, and preparing reports in order to ensure compliance with City and departmental policies, rules and regulations.
3. Assists in developing, managing and implementing a competitive bid process by identifying needs, establishing contractual relationships, preparing requests for proposals, consulting with compliance officers in monitoring contracts and/or agreements, reviewing and amending contract documents prepared by contractors/vendors to verify specifications meet departmental requirements.
4. Manages office and coordinates clerical & technical support activities by assigning and evaluating a variety of clerical/administrative functions, such as, data processing, inventory control, distributing or reproducing reports, performing personnel, purchasing & billing functions, invoices, statements, coordinating building security and maintenance, and facilities management.
5. Prepares agenda items, attends department meetings, and/or makes presentations at various types of business meetings, including commission(s) meetings, inter-agency meetings or contract negotiations meetings on behalf of the department. May assist in scheduling of some of those meetings.
6. May supervise and evaluate clerical and technical support staff by delegating and reviewing work assignments, counseling and assisting on performance evaluations, and coordinating duties to ensure that procedures, policies and regulations are followed.

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**Title: Junior Management Assistant
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7. Gathers, compiles, analyze data and prepares reports using database programs, spreadsheets, various word processing applications, and statistical techniques to conduct surveys, needs assessments, evaluation reports, compile and analyze statistical data, conduct web pages research, and prepare reports for program evaluation.
8. Assists in the development and recommends changes to rules, regulations, policies and procedures by proposing and reviewing provisions and evaluating the effect of proposed regulations, laws, etc., on specific or general personnel, budgeting and other management or administrative functions.
9. Assists in the analyses of programs, proposals & projects by researching and reviewing related information either manually and/or electronically, reviewing documentation, interviewing experts, reading abstracts, prioritizes tasks and guidelines in order to accurately relay information to department supervisors.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: Technical methodology, principles, techniques, procedures, and regulations utilized in the management and administration of budget, contract, leases, agreements and grants.

Ability or Skill to: apply techniques, methods, procedures, principles, and regulations; use system applications in a network environment; gather and analyze information; communicate verbally and in writing; and understand and apply human relations principles.

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Possession of a baccalaureate degree from an accredited college or university.

Substitution:

May substitute up to two (2) years of the required education with additional qualifying experience in program/office/operations management, budget development and/or administration, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

License and Certification

None

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**Title: Junior Management Assistant
Job Code: 1840**

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

To: 1842 Management Assistant
From: Original Entrance Examination

ORIGINATION DATE: 11/2/1961
AMENDED DATE: 5/26/2000, 8/25/2009; 8/1/2023
REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*
BUSINESS UNIT(S): COMMN, SFMTA

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DEPARTMENT OF HUMAN RESOURCES**

**Title: Management Assistant
Job Code: 1842**

DEFINITION

Under general supervision, the Management Assistant performs professional-level administrative and/or management duties in a variety of functional areas, such as: office/operations management; budget development, administration and fiscal reporting; development and administration of contractual agreements and grants; and evaluation and development of management policies and procedures, including evaluation of impact of existing and proposed legislation.

DISTINGUISHING FEATURES

Class 1842 Management Assistant is distinguished from Class 1844 Senior Management Assistant in that the latter performs duties of a more difficult and complex nature. Class 1842 Management Assistant is distinguished from Class 1840 Junior Management Assistant in that the latter is an entry level class performing less difficult and complex duties with no supervision of professional staff.

SUPERVISION EXERCISED

May supervise assigned clerical, technical and subordinate professional staff.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Manages or assists in management of the resources and staffing of an office, section, operation or program; monitors available budget and maximizes use of existing staff and resources for office, program or section; recommends changes in staffing and/or acquisition of equipment/materials; oversees various staffing and personnel-related functions; oversees purchasing, billing and inventory control; coordinates building security, maintenance and utilization of space.
2. Manages or assists in management of the functions of an office, section, operation or program; plans, prioritizes and schedules workload, delegating specific tasks as necessary to subordinate staff; coordinates and oversees clerical and technical support activities; monitors productivity and evaluates outcomes; compiles and produces a variety of status reports for management; ensures compliance with established departmental policies, procedures and goals as well as legal requirements and regulatory mandates.
3. Supervises or assists in supervising the work of assigned staff; plans, assigns, directs and reviews work; monitors and evaluates performance of subordinate personnel; completes performance appraisals and counsels employees; fosters cooperation and teamwork amongst staff; provides training and aids in staff development.
4. Coordinates or assists in coordinating work and/or planning functions with other offices, programs or sections to meet established goals and objectives; acts as liaison and promotes good working relationships with other offices, programs, sections and departments; addresses or assists in addressing issues relevant to assigned office, program or section with departmental personnel, representatives of other departments and outside agencies,

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and members of the public; arranges meetings and assists in development of agenda; participates in department meetings, including making presentations; may represent department at meetings and hearings on specific issues.

5. Performs and/or assists management in a variety of research and reporting functions; identifies issues; consults with departmental personnel and other individuals/experts; evaluates proposals, information and documentation from a wide variety of sources; conducts surveys and needs assessment; gathers, compiles and analyzes statistical and other data; writes reports and prepares documentation for evaluation by management and/or administrative staff; presents reports and data, including formal presentations to groups.
6. Assists in development of policies, procedures and work practices of an office, program, operation or section; reviews and evaluates existing policies, procedures and work practices; consults with managers, administrators and other staff; reviews and evaluates the effect of proposed and existing legislation, regulations and law on organizational structure and operations; assists in development and implementation of changes to policies and procedures in compliance with overall City/departmental policies and goals.
7. Assists in budget development, resource planning, and fiscal reporting; assesses staff and resource needs of office, program, section based on research and consultation with managers and administrative staff; assists in review of budget requests from departmental managers; assists in development of annual departmental budget; monitors revenues and/or expenditures and reconciles accounts; assists in fiscal/financial analysis; gathers information and writes or assists in writing reports related to budget, fiscal, resource and staffing issues.
8. Assists in development, implementation and administration of competitive bid processes and contractual agreements; assists in the development of language and specifications; prepares or assists in preparing contractual documents; assists in preparation of requests for proposals and bid solicitation; consults with departmental staff to ensure that departmental requirements are accurately described; assists in evaluation of bid information provided by contractors/vendors; assists in establishment and maintenance of contractual relationships; assists in monitoring and enforcement of legal agreements to ensure compliance.
9. Assists in the monitoring and oversight of grants received by department; prepares or assists in preparing grant proposals; reviews funding limitations and other requirements specified by grantor; assists in monitoring departmental expenditures to ensure funding limitations are not exceeded; assists in monitoring other criteria to ensure compliance with standards required by grantor.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: the principles, procedures and legal standards utilized in a variety of management and administrative functions such as supervision and/or management of an office, program, operation or section or facility; budget planning and development; financial/fiscal monitoring and reporting activities; evaluation and development of management policies and procedures; evaluation of existing and proposed legislation and regulatory mandates; development

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and administration of competitive bid processes and contractual agreements; and grant oversight and monitoring.

Ability or Skill to: identify, gather and evaluate information from a variety of sources; formulate logical conclusions and develop effective courses of action and/or recommendations; use computer applications, including e-mail, word processing, spreadsheets, databases and the internet to prepare correspondence, reports and other documentation, extract and process information and create and maintain records; prepare clear, accurate and well-organized reports, memos, and correspondence; speak clearly and concisely in order to effectively express ideas and communicate work-related information to a variety of individuals and groups; listen, ask appropriate questions and effectively elicit information; establish and maintain effective working relationships with staff, officials and the general public; respect right of privacy and exercise discretion; interpret and apply established management and supervisory principles, policies and procedures; plan, assign, train, direct and monitor the work of assigned staff; evaluate performance and counsel employees; effectively utilize existing staff and resources; plan and direct the functions of a program, office or section; prioritize and organize multiple assignments and projects; exercise sound judgement and appropriately refer issues to managers/administrators; coordinate work and functions with other offices, programs or sections; ensure compliance with established policies and procedures; and facilitate attainment of established goals and objectives.

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Possession of a Baccalaureate Degree from an accredited college or university.

Experience:

One (1) year full-time equivalent experience performing professional-level management and/or administrative duties in functional areas such as: program/office/operations management, budget development and/or administration, development and administration of contractual agreements and/or grants, or other closely related functional areas.

License and Certification:

Substitution:

Applicants may substitute up to 2 years of required education with additional qualifying experience in program/office/operations management, budget development and/or administration, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

SUPPLEMENTAL INFORMATION

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Management Assistant
Job Code: 1842**

PROMOTIVE LINES

TO: Senior Management Assistant

FROM: Junior Management Assistant

ORIGINATION DATE: 10/5/1961

AMENDED DATE: 3/2/2001; 9/28/2009; 8/1/2023

REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN, SFMTA

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Senior Management Assistant
Job Code: 1844**

DEFINITION

Under general supervision, the Senior Management Assistant performs difficult and complex professional level administrative and/or management duties in a variety of functional areas, such as: office/operations management; budget development, administration and fiscal reporting; development and administration of contractual agreements, leases and grants; evaluation and development of management policies and procedures; management of department specific programs and functions.

DISTINGUISHING FEATURES

Class 1844 Senior Management Assistant is the highest level in the management assistant series. It is distinguished from the next lower class, 1842 Management Assistant, in that its assignments are of a more difficult and complex nature.

SUPERVISION EXERCISED

May supervise assigned clerical, technical and subordinate professional staff.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Manages the resources and staffing of an office, section, operation or program: monitors available budget and maximizes use of existing staff and resources; recommends changes in staffing and/or acquisition of equipment/materials; oversees various staffing and personnel-related functions; oversees purchasing, billing and inventory control; coordinates building security, maintenance and utilization of space.
2. Manages the functions of an office, section, operation or program: plans, prioritizes and schedules workload, delegating specific tasks as necessary to subordinate staff ; coordinates and oversees clerical & technical support activities; monitors productivity and evaluates outcomes; compiles and produces a variety of status reports for management; ensures compliance with established departmental policies, procedures and goals, as well as legal requirements and regulatory mandates.
3. Supervises the work of assigned staff: plans, assigns, directs and reviews work; monitors and evaluates performance of subordinate personnel; completes performance appraisals and counsels employees; provides training and aids in staff development; fosters cooperation and teamwork amongst staff.
4. Coordinates work and/or planning functions with other offices, programs, agencies, contractors, departments and members of the public to meet established goals and objectives: acts as liaison and promotes good working relationships with other offices, programs, agencies, contractors, departments and members of the public; addresses issues relevant to assigned office, program, operation or section with departmental personnel, representatives of other departments and outside agencies, and members of the public, including resolution of problems and complaints; arranges meetings, develops agenda and conducts

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**Title: Senior Management Assistant
Job Code: 1844**

meetings as needed; participates in department meetings, including making presentations; may represent department at meetings and hearings.

5. Performs a variety of research and reporting functions: identifies issues; consults with departmental personnel and other individuals/experts; evaluates information and documentation from a wide variety of sources; conducts surveys and needs assessment; gathers, compiles and analyzes statistical and other data; writes reports and prepares documentation for evaluation by management and/or administrative staff; presents reports and data, including formal presentations to groups.
6. Develops and/or recommends policies, procedures and work practices for an office, program, operation or section: reviews and evaluates existing policies, procedures and work practices; consults with managers, administrators and other staff; views and evaluates the effect of proposed and existing legislation, regulations and law on organizational structure and operations; develops/recommends and implements changes to policies and procedures in compliance with overall City/departmental policies and goals.
7. Performs or assists in budget development, resource planning, and fiscal reporting: assesses staff and resource needs of office, program, operation or section based on research and consultation with managers and administrative staff; reviews budget requests from departmental managers; assists in development of annual departmental budget; monitors revenues and/or expenditures; performs fiscal/financial analysis; gathers information and prepares reports related to budget, fiscal, resource and staffing issues.
8. Develops and administers contractual agreements: develops language and specifications; prepares contractual documents; prepares requests for proposals and bid solicitation; consults with departmental staff to ensure that departmental requirements are accurately described; evaluates bid information provided by contractors/vendors; establishes and maintains contractual relationships; monitors legal agreements to ensure ongoing compliance.
9. Monitors and oversees grants received and/or disbursed by department: when overseeing grants received by department, prepares grant proposals, reviews funding limitations and other requirements specified by grantor, monitors departmental expenditures to ensure funding limitations are not exceeded, monitors other criteria to ensure compliance with standards required by grantor; when overseeing grants awarded and disbursed by department, determines fund for specific grant categories, drafts grant guidelines and eligibility requirements, reviews grant applications for compliance with guidelines/requirements, creates and leads panels that make recommendations for grant awards, may provide technical assistance to grantees to assure ongoing compliance with terms of grant

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: principles, procedures, protocols, legal standards and regulations utilized in a variety of management and administrative functions such as: management and/or supervision of an office, program, operation, section or facility; budget planning and development; financial/fiscal monitoring and reporting activities; evaluation and development of management policies and procedures; evaluation of existing and proposed legislation, legal standards & regulatory mandates; development and administration of contractual agreements; grant oversight and monitoring.

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**Title: Senior Management Assistant
Job Code: 1844**

Ability or Skill to: interpret and apply established management and supervisory principles, policies and procedures; plan, assign, train, direct and monitor the work of assigned staff; evaluate performance and counsel employees; effectively utilize existing staff and resources; direct, monitor and evaluate the functions, staffing and resources of a program, office or section, including projection of staffing and material needs; develop and/or make recommendations for operational methods, policies and procedures, including implementation of changes and evaluation of impact; prioritize and organize multiple assignments and projects for self and others; exercise sound judgement and appropriately refer issues to managers; coordinate work and functions with other offices, programs or sections; ensure compliance with established policies and procedures; facilitate attainment of established goals and objectives; identify, gather and evaluate information from a variety of sources; formulate logical conclusions and develop effective courses of action and/or recommendations; use computer applications, including e-mail, word processing, spreadsheets, databases and the internet to prepare correspondence, reports and other documentation, extract and process information and create and maintain records; prepare clear, accurate and well-organized reports, memos, and correspondence; speak clearly and concisely in order to effectively express ideas and communicate work-related information to a variety of individuals and groups; listen, ask appropriate questions and effectively elicit information; establish and maintain effective working relationships with staff, officials and the general public.

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Possession of a Baccalaureate Degree from an accredited college or university.

Experience:

Three (3) year full-time equivalent experience performing professional-level management and/or administrative duties in functional areas such as: program/office/operations management, budget development and/or administration, development and administration of contractual agreements and/or grants, or other closely related functional areas.

License and Certification:

Substitution:

Applicants may substitute up to 2 years of required education with additional qualifying experience in program/office/operations management, budget development and/or administration, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Senior Management Assistant
Job Code: 1844**

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

From: Management Assistant

ORIGINATION DATE: 1/4/1962

AMENDED DATE: 10/29/1999; 12/27/2002; 9/28/2009; 8/1/2023

REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN, SFMTA