

Housing Authority of the County of Stanislaus

...also serving Alpine ▪ Amador ▪ Calaveras ▪ Inyo ▪ Mariposa ▪ Mono ▪ Tuolumne Counties.

DATE: March 9, 2017

TO: Board of Commissioners

FROM: Barbara S. Kauss, Executive Director

SUBJECT: Strategic Plan - Classification Plan Update

PREPARED BY: Kimberly Murdaugh, Director of Human Resources and Business Operations

BACKGROUND / DISCUSSION

The Strategic Plan is a roadmap for the journey towards responsible expansion. This journey has been presented in three phases which reflect the short-term, mid-term and long-term objectives designed to achieve the strategic commitments. This plan has evolved and will continue to evolve over time. As such the classification plan has been refined to reflect an organizational structure to support the agency and facilitate development. The changes include a reclassification of the vacant Management Analyst to Deputy Director, modification of duties assigned to the Director of Human Resources and Business Operations and modification of duties assigned to the Director of Finance.

FISCAL IMPACTS

This item does not have a fiscal impact.

ATTACHMENTS

1. Strategic Plan Classification Plan Update Powerpoint
2. Deputy Director classification
3. Director of Human Resources and Business Operations classification
4. Director of Finance classification

PHASE 2 PROGRESS AND ACCOMPLISHMENTS

- ▶ Classification Plan Update
 - ▶ Creation of Management Analyst
 - ▶ Clerk of the Board, Executive Support, Supervision of Administrative Staff, Policy Preparation
 - ▶ Creation of Resident Services Coordinator
 - ▶ Oversight of HACS Community Centers, Staff and Agreements, Development of Resident Programs and Advisory Board, Grant Preparation & Administration
 - ▶ Creation of Administrative Analyst
 - ▶ Human Resources Program Support
 - ▶ Creation of Management Analyst, Resident Services Coordinator and Administrative Analyst 75% FTE \$280,152
 - ▶ Allocate Funding from Vacant Administrative Office Supervisor and Resident Services Representative -\$175,484
 - ▶ ROSS Grant -\$ 70,000
 - \$ 34,668





HOUSING AUTHORITY OF THE COUNTY OF STANISLAUS

Deputy Director
\$79,908 - \$97,320/Annually
(+3% COLA)

SUMMARY

To perform a wide range of professional and management level duties in support of agency policies, programs, operations, and services; serve as Clerk of the Board and manage all activities and records related to Board of Commissioners; provide highly responsible and complex administrative support to the Executive Director; provides effective leadership and direct supervision of procurement and administrative support personnel.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Executive Director. Directly supervises clerical staff assigned to the Administrative office. Carries out supervisory responsibilities in accordance with the organization's policies, procedures and applicable laws.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Assist in the development of Authority plans, goals, objectives, policies and procedures of the Housing Authority and implementation of Federal, State, and local directives and statutes and other Authority programs; and, as applicable, procedures for department activities and programs.
- Prepare or direct the preparation and submittal of timely reports for internal and external use, including the Authority's Annual and Five Year plans, Annual Report as well as proposals and grants to the U.S. Department of Housing and Urban Development and other partnering entities and funding sources.
- Research, compile, analyze data and prepare comprehensive reports, compile information to be used in special projects and reports.
- Participate in the implementation of strategic plan commitments including development of affordable housing.
- Plan, assign and direct work of staff in the Administration department.
- Participate in the selection of staff. Responsible for assuring appropriate employee training, motivation, supervision, and evaluation. Recommend salary increases and take disciplinary action as necessary and authorized. Approve leave requests and time cards.



ESSENTIAL DUTIES AND RESPONSIBILITIES, CONTINUED

- Assess and monitor workloads, administrative and support systems, and internal reporting relationships; identify opportunities for improvement; direct and implement change. Establish programs to correct management deficiencies.
- Assist the Executive Director with Board relations and manage preparation of Board agenda and materials for regular and special board meetings; maintain public records.
- Provide administrative support for two Boards of Commissioners; prepares and presents staff reports and other correspondence. Provides staff reports to other boards and commissions, as assigned.
- Make verbal reports and presentations to the Board of Commissioners and other bodies.
- Manage coordination of training and retreats, as needed, for both Commissions.
- Represent the Authority to outside agencies; coordinate Authority activities with those of cities, counties, and outside agencies and organizations.
- Organize and direct the maintenance of Executive Director calendar and daily schedule, preparation of materials as needed for meetings.
- Organize and direct coordination of travel for the Executive Director and Commissioners attending conferences and training; books airline tickets and arranges hotel accommodations within budgetary confines in accordance with Authority travel policy.
- Supervise the preparation of all letters, correspondence, reports, briefs, presentations and documents for Executive Director; receives, sorts, reads, routes and responds to Executive Director mail as needed; establishes and maintains effective filing systems for documents, contracts, reports and records.
- Applies and ensures compliance with purchasing policies and procedures, HUD regulations, State and Local law and assists in the development of policies and procedures relating to purchasing, supply and inventory management, and fixed asset identification and tracking.
- Initiates or assists in the preparation, solicitation, advertisement, evaluation and award of bids and requests for proposals for all goods and services procured by the Authority.
- Maintains a supplier database and corresponds with suppliers regarding requirements, bids, awards, and/or disputes.
- Designs and maintains a parts and supplies system and prepares necessary catalogs and/or tracking systems. Responsible for auditing requirements from central stores inventory.
- Functions as the survey officer in the maintenance of fixed assets inventories. Responsible for cataloging additions and handling dispositions. Supervises the performance of annual inventory of fixed assets, furniture, and equipment.
- Maintains all purchasing records and files in accordance with Authority's policies, HUD requirements, applicable state and local laws, and sound business practices.
- Other duties as assigned.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

KNOWLEDGE, SKILLS & ABILITIES

- Knowledge of Authority programs, policies and procedures, pertinent Federal, State, and local laws, codes and regulations.
- Knowledge of principles of management necessary to assist the Housing Authority and its departments, including selection, training, supervision, and evaluation of employees and techniques used to motivate personnel, maintain high employee morale and promote teamwork.
- Knowledge of principles and practices of grant writing and administration.
- Ability to plan, organize, direct, coordinate and administer activities, programs and personnel of the Housing Authority; implement policies and procedures, review recommendations and actions of subordinates.
- Ability to interpret, explain and apply appropriate laws, rules and regulations.
- Ability to analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals;
- Ability to engage a wide variety of people with a high level of professionalism and courtesy, including culturally, socially and economically diverse populations, seniors, persons with disabilities and professional colleagues.
- Ability to establish and maintain effective working relationships with Housing Authority staff, officials, governmental and private agencies, client groups, community organizations, and the public.
- Ability to prepare business correspondence and written reports.
- Ability to write and speak effectively, lead meetings and conduct training.
- Ability to manage a variety of programs accurately and efficiently.
- Ability to organize work effectively to meet schedules and deadlines.
- Ability to prepare and maintain accurate records.
- Possess a high degree of proficiency in Microsoft Office products, including Word, Excel and Outlook.

EDUCATION & EXPERIENCE

- Graduation from an accredited four (4) year college or university with major coursework in Public Administration, Business Operations, applicable social science or closely related field.
- Five (5) years of increasingly responsible administrative and management experience in a public agency that includes implementation of Federal, State and local housing laws, regulations and relative directives including two (2) years of supervisory experience.
- An equivalent combination of education, training, and experience, which provides the required knowledge and abilities, may be substituted on a two for one basis.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

MATHEMATICAL SKILLS

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

CERTIFICATES, LICENSES, REGISTRATIONS

Must possess and maintain an applicable California Driver's License and a driving record acceptable to the Authority's insurance carrier. (Exceptions will be considered on a case by case basis).

PHYSICAL DEMANDS

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

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand and sit. The employee is occasionally required to walk; use hands to finger, handle, or feel; and reach with hands and arms. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

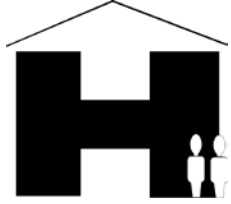
WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to fumes or airborne particles and outside weather conditions. The noise level in the work environment is usually moderate.



The Housing Authority of the County of Stanislaus is an equal opportunity employer. The Authority will provide equal employment opportunities to all qualified individuals, without regard to religious affiliation, marital status, physical or mental disability, national origin, citizenship, age, race, color, creed, gender, gender identity, sexual orientation, genetic makeup, political or union affiliation, status as a veteran

or disability. The Authority will make reasonable efforts in the employment process to accommodate applicants with disabilities. Individuals requesting reasonable accommodations must do so no later than three (3) working days after the time of invitation by the Authority to an examination. Applicants with special needs may call (209)557-2000(voice) or (209)557-2012(TDD).



HOUSING AUTHORITY OF THE COUNTY OF STANISLAUS

Director of Human Resources and Business Operations

SUMMARY

Under the direction of the Executive Director, the Director of Human Resources and Business Operations performs highly responsible administrative work involved in the day-to-day administration of the Authority's human resource, procurement functions, IT functions/contracts. Examples of duties include performance, oversight and/or supervision, classification, compensation, recruitment, payroll administration, selection, orientation, training programs, procurement management, special project contract administration, Agency public relations and IT management. May participate in oversight of the Agency's Capital Fund on an as needed basis. Responsibilities include participating in the development, monitoring and administering collective bargaining agreements; employer-employee relations, including disciplinary guidance and complaint investigations and developing, validating and analyzing oral, written and performance examinations, preparing and submitting regulatory reports, receiving requisitions, consulting with vendors, ~~preparing bid specifications, and awarding bids, monitoring of special project budgets and the requisition of modernization funds~~ and public relations duties in conjunction with the Executive Director. Priority Functions will be Human Resources, Procurement, ~~procurement management~~ and Contract Management. Performance of the duties requires considerable knowledge of federal, state and local laws, operating policies and procedures, and purchasing requirements and regulations. The incumbent exercises initiative in most cases and in cases involving substantial expenditures of Authority funds.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following:

The below statements are intended to describe the general nature and scope of work being performed by this position. This is not a complete listing of all responsibilities, duties and/or skills required. Other duties may be assigned.

Human Resources

1. Provide technical assistance to administrators and supervisors on personnel, labor relations and other Business Operation matters. Interprets and implements personnel policies and procedures; assures compliance with the provisions of existing collective bargaining agreements; advises supervisory or management staff regarding interpretation and application of personnel policy and procedure and Memorandums of Understanding.
2. Plans, implements and monitors human resource recordkeeping processes including personnel transactions, files and records including the maintenance of prior annual records.



4. Supervises the maintenance of Authority personnel and payroll files.
5. Plan, organize, and monitor the selection, placement, transfer, reassignment and related activities of Authority personnel in accordance with Authority policies, state and federal law, collective bargaining contracts, and effective Business Operation practices.
6. Oversees the administration of the employee benefit programs including Health, Dental, Life, Disability, and Retirement, Workers Compensation, State Disability Insurance, FMLA, Paid Family Leave, etc.
7. Maintains classification and compensation plans including developing and maintaining job descriptions; implement appropriate salary schedules and classification of new and revised positions.
8. May serve, as needed, as a member of the management negotiating team in labor negotiations.
9. Assist in developing and monitoring annual budget and forecast, including reporting of budget variances.
10. Participates in the development and administration of Agency business policies and procedures.

Procurement and IT

1. Plans, directs and coordinates Management Information systems including maintenance of website.
2. ~~Applies and ensures compliance with purchasing policies and procedures, HUD regulations, State and Local law and assists in the development of policies and procedures relating to purchasing, supply and inventory management, and fixed asset identification and tracking.~~
3. ~~Initiates or assists in the preparation, solicitation, advertisement, evaluation and award of bids and requests for proposals for all goods and services procured by the Authority.~~
4. ~~Maintains a supplier database and corresponds with suppliers regarding requirements, bids, awards, and/or disputes.~~
5. ~~Designs and maintains a parts and supplies system and prepares necessary catalogs and/or tracking systems. Responsible for auditing requirements from central stores inventory.~~
6. ~~Functions as the survey officer in the maintenance of fixed assets inventories. Responsible for cataloging additions and handling dispositions. Supervises the performance of annual inventory of fixed assets, furniture, and equipment.~~
7. ~~Maintains all purchasing records and files in accordance with Authority's policies, HUD requirements, applicable state and local laws, and sound business practices.~~
8. ~~Oversees the annual destruction of sensitive Housing Authority documents and paperwork in accordance with policy.~~
9. Oversees priority agency business contracts including the contract for IT services.
10. Research and plan technology needs of the Agency and oversee all aspects of the Housing Authority's communication and information systems to optimize user efficiency.
11. Audits invoices and bills for goods and services.
12. Trains and evaluates subordinates to ensure occupational growth, effectiveness and productivity including identifying training needs of personnel and ensuring the development and implementation of an individual Professional Development Plan for each subordinate.

Other Management Duties

1. Performs other duties as required including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise balance the workload.
2. Participate as needed in housing development and non-profit oversight/development
3. Interacts and communicates effectively and professionally with other Authority leadership, other employees, Authority attorneys, clients, vendors, neighbors and other members of the community.
4. Ensures the highest quality of customer service to Authority clients, landlords, and the general public.

5. 504 Coordinator
6. Other duties as assigned

QUALIFICATIONS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

KNOWLEDGE AND ABILITIES:

1. Knowledge of the basic principles of human resource administration, principles and practices of organizational development and supervision.
2. Ability to perform complex tasks to support various operational and management programs and procedures.
3. Knowledge of principles of effective supervisory management, fiscal management and human resources management.
4. Knowledge of the principles and practices of payroll administration.
5. Ability to interpret complex personnel laws.
6. Ability to maintain effective audio-visual discrimination and perception needed for making decisions as a result of observations and communication with others.
7. Ability to communicate clearly and concisely, both orally and in writing.
8. Must be able to operate a variety of automated office machines including computers, copiers, printers, facsimile machines, telephones, etc.
9. Knowledge of Federal, State and Local procurement and regulations
10. Knowledge of the principles and practices of contract management and monitoring

EDUCATION, TRAINING AND/OR EXPERIENCE

1. Graduation from an accredited four (4) year college or university with major coursework in Business Operations, Human Resources, Organizational Development, Public Administration or closely related field.
2. Five (5) years of progressively responsible job related experience in fields such as human resource program administration and payroll, business operations, public administration or closely related field.
3. An equivalent combination of education, training, and experience, which provides the required knowledge and abilities, may be substituted on a two for one basis.

CERTIFICATES, LICENSES, REGISTRATIONS

Must possess and maintain an applicable California Driver's License and a driving record acceptable to the Authority's insurance carrier. (Exceptions will be considered on a case by case basis)

PHYSICAL DEMANDS

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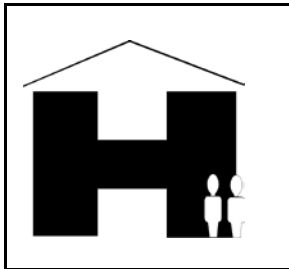
job, the employee is regularly required to sit, talk or hear. The employee frequently is required to sit and use hands to finger, handle, or feel. The employee is occasionally required to stand; walk; reach with hands and arms. Must be able to move or carry objects such as files, computer printouts, reports, calculators, office supplies, etc. The employee must regularly lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, and color vision.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties. The noise level in the work environment is usually moderate.



The Housing Authority of the County of Stanislaus is an equal opportunity employer. The Authority will provide equal employment opportunities to all qualified individuals, without regard to religious affiliation, marital status, physical or mental disability, national origin, citizenship, age, race, color, creed, gender, gender identity, sexual orientation, genetic makeup, political or union affiliation, status as a veteran or disability. The Authority will make reasonable efforts in the employment process to accommodate applicants with disabilities. Individuals requesting reasonable accommodations must do so no later than three (3) working days after the time of invitation by the Authority to an examination. Applicants with special needs may call (209)557-2000(voice) or (209)557-2012(TDD).



HOUSING AUTHORITY OF THE COUNTY OF STANISLAUS

Director of Finance

SUMMARY

To plan, organize, direct and review the activities and operations of the Finance Department including accounting, budgeting and financial planning and analysis, to coordinate assigned activities with other departments and outside agencies; and to provide highly responsible and complex administrative support to the Executive Director.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Executive Director and directly supervises Supervisors and staff. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, recommending for hire, and training employees, planning, assigning and directing work; appraising performance; rewarding and recommending the disciplining of employees; addressing complaints and resolving problems.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Assumes full management responsibility for all Finance Department services and activities including accounting, budgeting and financial planning and analysis; recommends and develops policies and procedures for improving financial operations and internal controls.
- Provides and directs procedures and systems necessary to maintain proper records and to afford adequate accounting controls and services.
- Directs and coordinates the establishment of budgets for departments and programs.
- Analyzes all accounting procedures and provides statistical and routine reports.
- Responds to and resolves difficult and sensitive inquiries and complaints regarding Authority financial activity.
- Serves as the custodian of funds, securities and assets of the Authority.
- Oversees and directs the preparation and issuance of the Authority's year-end financial statements and reports and submits the same to appropriate agencies.
- Keeps abreast of changes in laws, policies and HUD regulations related to financial operations and ensures adherence to HUD policies, procedures, regulations and guidelines.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.



KNOWLEDGE/ABILITIES

- Principles and practices of accounting and auditing.
- Pertinent Federal, State and local laws codes and regulations.
- Principles and procedures of financial record keeping and reporting.
- Statistical procedures and mathematical concepts.
- Principles and practices of budget preparation and administration.
- Knowledge of Management Information Systems.

MINIMUM EDUCATION, TRAINING AND/OR EXPERIENCE

Bachelor's degree (B.S.) from four-year college or university with major in accounting, finance or a related field. Six years of increasingly responsible financial and accounting experience including two years of administrative and supervisory responsibility.

LANGUAGE SKILLS

Ability to read, analyze, and interpret common technical journals, financial reports, and legal documents. Ability to respond to common inquiries or complaints from clients, regulatory agencies, or members of the business community. Ability to write speeches and articles for publication that conform to prescribed style and layout. Ability to effectively present information to the Executive Director, the Board of Commissioners and public groups.

MATHEMATICAL SKILLS

Ability to apply advanced mathematical concepts such as exponents, logarithms, quadratic equations and permutations. Ability to apply mathematical operations to such tasks as frequency distribution, determination of test reliability and validity, analysis of variance, correlation techniques, sampling theory, and factor analysis.

REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

CERTIFICATES, LICENSES, REGISTRATIONS

- Valid California Driver's License.

PHYSICAL DEMANDS

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