



**Date:** April 15, 2020  
**To:** Civil Service Commission  
**From:** Carolyn Pen, Administrative Analyst  
**Subject:** **REQUEST FOR TEMPORARY REASSIGNMENT AND TRANSFER FOR  
REHABILITATION AND/OR TRAINING – VICTOR E. GARCIA**

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Correspondence has been received from Stacey Lewis, Director of Human Resources at Harbor Department, requesting a temporary reassignment and transfer for rehabilitation of Mr. Victor E. Garcia, a General Maintenance Assistant in the Harbor Department, to the position of Accounting Clerk in the Department of Development Services. Staff has reviewed the request and recommends approval in accordance with Article VI, Sections 63(5) and 64 of the Civil Service Rules and Regulations.

**The following information is presented for consideration:**

- On March 28, 2016, Mr. Garcia was hired by the Harbor Department as a General Maintenance Assistant. He was assigned to the Carpentry Section of the Maintenance Division where he maintains a permanent, full-time classified status as a General Maintenance Assistant.
- On January 9, 2017, Mr. Garcia was involved in a serious non-occupational injury.
- On August 7, 2018, Mr. Garcia's treating physician provided permanent work restrictions, in which Mr. Garcia would be unable to perform the essential functions of his job as a General Maintenance Assistant with the Harbor Department.
- In accordance with the Fair Employment and Housing Act (FEHA) and the Americans with Disabilities Act/ Amendments, the Harbor Department conducted the Interactive Process with both the employee and management to seek alternative opportunities that could possibly accommodate his permanent work restrictions.
- The Harbor Department was able to identify a reassignment and transfer for rehabilitation and training opportunity within the classification of Accounting Clerk, under the Department of Development Services.
- Ayisha Thompson, Occupational Health Human Resources Officer, has reviewed the documents and concurs that this position complies with Mr. Garcia's work restrictions. Mr. Garcia can be reasonably expected to physically perform the duties of the Accounting Clerk position in the Department of Development Services.
- Staff has reviewed the request form and all documents attached. A requisition was received on March 23, 2020.
- The Training Plan Outline submitted by the Harbor Department describes the goals and objectives, training method and criteria necessary to measure the satisfactory

April 9, 2020

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completion of the employee's assignment. The projected term of the training assignment will not exceed one year.

- Mr. Garcia will complete a one-year training period and upon satisfactory completion this program, the Department will seek Civil Service Commission approval of his permanent appointment to the position of Accounting Clerk.
- Mr. Garcia has been notified of the conditions of the temporary reassignment and transfer for rehabilitation, and that this request will be an item on the Commission agenda for April 15, 2020.
- Representatives from the Harbor Department and the Department of Development Services will attend the Commission meeting for any questions.

**Recommendation:**

- In accordance with Article VI, Sections 63(5) and 64 of the Civil Service Rules and Regulations, Civil Service staff recommends approval Mr. Garcia's Request for Temporary Reassignment and Transfer for Rehabilitation to the classification of Accounting Clerk.

CIVIL SERVICE DEPARTMENT  
REQUEST FOR CIVIL SERVICE COMMISSION ACTION GUIDELINES

**REQUEST FOR TEMPORARY REASSIGNMENT AND TRANSFER FOR  
REHABILITATION AND/OR TRAINING**

Civil Service Rules and Regulations    Section 63 (5)  
Civil Service Rules and Regulations    Section 64

Form to be completed by: **Stacey V. Lewis, CHRO/Director of Human Resources – Harbor Department**  
Name/Title/Department

Date: **3-30-2020**

**Section 1: To be completed by department.**

To be completed  
by department

Civil Service Dept.  
Verification

A requisition is required. The requisition number is: **#DV20-034.**    **Date Received: 3/23/2020**

Has the requisition been received in the Civil Service Department?

**Yes**    No

**CP**

A request for transfer must be included in the request to Commission if the appointee will move between departments. Is a transfer necessary? **Yes, the employee will be transferring from the Harbor Department to Department of Development Services.**

**Yes**    No

**CP**

Have all required documents been submitted to the Civil Service Department?

- Completed Training Program Outline
- Employee Consent Form

**Yes**    No  
**Yes**    No

**CP**  
**CP**

**Section 2: Points to be addressed in request:**

Formal name and current classification title of employee.

Name: **Victor E. Garcia** Classification Title: **General Maintenance Assistant**

**Yes**

**CP**

Summary of employee's work history, specifying all classification titles and dates, including date(s) permanent status was attained in each classification.

**Yes**

**CP**

Title: **General Maintenance Assistant**

Hire Date: **March 28, 2016**

Permanent Status Date: **September 28, 2016**

**Non-Occupational Injury**

Date of Permanent Medical Restriction: **August 7, 2018**

**Yes**

**CP**

Summary of training program, intent of program, goals, objectives, methods, time and criteria.

**1 year**

**CP**

Length of training requested. **1 year**

(For training longer than 1 year, the initial request should indicate the overall estimated length of program. A new request and plan must be resubmitted each year for evaluation and Commission approval.)

**Yes**

**CP**

Confirmation that employee will meet minimum qualifications upon successful completion of training program.

**Yes**    No

**CP**

Employee was contacted about salary, status, and requirement to apply and compete in examination process.

CIVIL SERVICE DEPARTMENT  
REQUEST FOR CIVIL SERVICE COMMISSION ACTION GUIDELINES

The following should be in attendance at the Civil Service Commission meeting:

- Requesting department.
- Any other impacted departments.
- Not required for the employee.

CP

Notes:

SUGGESTED ACTION:

Please see first page for staff report and suggested action.



Port of  
**LONG BEACH**  
THE PORT OF CHOICE

## Memorandum

**Date:** March 31, 2020

**To:** Civil Service Commission

**From:** Stacey Lewis, SPHR, SHRM-SCP, IPMA-SCP. CHRO/Director of Human Resources

**Subject:** **REQUEST FOR TEMPORARY REASSIGNMENT FOR REHABILITATION OF VICTOR E. GARCIA, GENERAL MAINTENANCE ASSISTANT, LONG BEACH BUSINESS DEVELOPMENT/ADMINISTRATION & FINANCIAL SERVICES**

### REQUEST:

The Harbor Department is requesting a temporary reassignment for rehabilitation and transfer of Victor E. Garcia, General Maintenance Assistant, Maintenance Division, to the position of Accounting Clerk III at the Department of Development Services. This is for the purpose of training and development, in accordance with **Article VI, Section 63(5) and 64 of the Civil Service Rules and Regulations.**

### EMPLOYMENT HISTORY:

Mr. Victor E. Garcia was hired on March 28, 2016, by the Harbor Department, as a General Maintenance Assistant. He was assigned to the Carpentry Section of the Maintenance Division where he maintains a permanent/full-time status as a General Maintenance Assistant.

### PERMANENT RESTRICTIONS AND REASSIGNMENT FOR TRAINING AND/OR REHABILITATION REQUEST:

On January 9, 2017, Mr. Garcia was involved in a serious non-occupational injury. On August 7, 2018, Mr. Garcia's treating physician, provided permanent work restrictions which called into questions whether or not he could perform the essential functions of his job as a General Maintenance Assistant, Maintenance Division/Harbor Department. In accordance with the Fair Employment and Housing Act (FEHA) and the Americans with Disabilities Act/Amendments, the Harbor Department conducted the Interactive Process with both the employee and management in an effort to seek alternative opportunities that could possibly accommodate his permanent restrictions as listed below:

### PERMANENT WORK RESTRICTIONS, EFFECTIVE AUGUST 7, 2018:

- Must drive using a hand-control device
- No working at heights above 5 feet or more including aerial lifts, scaffolding, man lifts
- No climbing stairs or ladders over 2 feet
- No running, jumping or impact type activities

The Interactive Process was conducted with Mr. Garcia. And, a separate meeting was held with his supervisor, Brian Hinkle and Superintendent, Louis Santana. An EFJA (Essential Function Job Analysis) was reviewed and the Position Description. After a thorough review of the job assignment, the Harbor Department/Carpentry Division decided that they would be able to accommodate the permanent work restrictions.

REQUEST FOR TEMPORARY REASSIGNMENT FOR REHABILITATION AND/OR  
TRAINING OF VICTOR E. GARCIA, GENERAL MAINTENANCE ASSISTANT,  
DEPARTMENT OF DEVELOPMENT SERVICES

April 1, 2020

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While Mr. Garcia was working at the Civil Service Department, (Transitional Duty Assignment) the Harbor Department was able to identify a Reassignment for Rehabilitation opportunity with Department of Development Services as an Accounting Clerk III. Mr. Garcia had been performing various aspects related to Munis and processing budget-related tasks (see attached resume) while working at the Harbor Department, Environmental Planning Division. It is believed Mr. Garcia would be successful after a one-year training plan.

The Harbor Department has informed Mr. Garcia of the Reassignment for Rehabilitation parameters as follows:

- This is a temporary assignment and does not guarantee permanent placement in the Accounting Clerk III – L.B. Business Development Department.
- Mr. Garcia will have to participate in a **twelve (12) month training program.**
- Mr. Garcia **will not** accrue any status as an Accounting Clerk III.
- Mr. Garcia's salary will remain that of his current classification as a General Maintenance Assistant.

Upon satisfactory completion of the twelve (12) month training period, the Department of Development Services will seek Civil Service Commission approval of Mr. Garcia's appointment to the position as an Accounting Clerk III. Upon approval by the Commission, Mr. Garcia will be reclassified as an Accounting Clerk III. Mr. Garcia has been made aware that the change in classification will create a reduction in salary and initiate a new probationary period

If you have questions, please contact me at (562) 283-7500.

Attachments: Reassignment for Rehabilitation Program –Plan Outline  
Employee Consent Form & Employee Statement of Qualifications  
Request for Temporary Reassignment for Rehabilitation

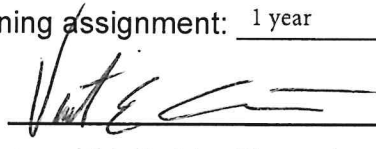
cc: Claudia Chilin, Citywide Return to Work Coordinator  
Michelle Hamilton, Human Resources - City HR Benefits AO  
Ayisha Thompson, Occ Health, AO  
Francisco Davila, Long Beach Business Development, AO  
Personnel Medical File



## Long Beach Civil Service Commission

**REASSIGNMENT FOR TRAINING PROGRAM****Training Plan Outline**

NAME OF PARTICIPANT: <u>Victor Garcia</u>	DATE: <u>March 9, 2020</u>
SOCIAL SECURITY NUMBER: _____	
DESIRED BEGINNING DATE: <u>ASAP</u>	
TITLE OF TRAINING CLASSIFICATION: <u>Accounting Clerk</u>	

1. **Goals and Objectives** (must encompass the most substantive duties, attach additional sheets if necessary)  
 To perform various clerical accounting duties in the preparation, processing, and maintenance of accounting records. The duties to accomplish this goal include (but are not limited too):
    - Maintain accounting records (e.g. Accounts Payable)
    - Prepare, assemble, tabulate, and verify bills, deposit receipts, vouchers, invoices, requisitions, and purchase orders.
    - Prepare basic/standard journal entries and makes accounting allocations
    - Provide cordial & helpful customer service to Department staff
  2. **Training Methods**
    - LBCOAST training for new employees.
    - Munis materials on Munis website including videos and documents. -1-on-1 training on internal processes and procedures
    - Department presentations on Accounts Payable and other Munis modules presentations.
    - staff suport and collaborative approach to problem solving.
  3. **Criteria to Measure Satisfactory Completion of Training Plan**
    - Increase in volume of transactions as training progresses
    - Reduction in amount of errors, with the goal of error free work.
    - Teachable posture as seen by asking questions when directions are unclear.
    - Continuing to learn new processes as the City continues its transition to the new LBCOAST system - Team player who works with the team to accomplish the mission of the Financial Services Division.
  4. **Projected term of training assignment:** 1 year
  5. **Signature of Trainee:**  **Date:** 3/11/2020
- By my signature, I have read this Training Plan and understand it.

Assignment successfully completed? YES ☐ NO ☐

Assignment terminated? YES ☐ NO ☐ If "yes" please explain below.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Immediate Supervisor\_\_\_\_\_  
Bureau/Division Manager





## Long Beach Civil Service Commission

## REASSIGNMENT FOR TRAINING PROGRAM

## Employee Consent Form

I, the undersigned, am aware that the Development Services Department is requesting authorization from the Long Beach Civil Service Commission to temporarily assign me to perform the duties of the Accounting clerk classification. I understand the proposed reassignment, pursuant to Civil Service Rules and Regulations, Section 63(3), is for training and development purposes only, and will, if approved, be effective for a period of no more than one year.

I further understand that:

1. Completion of the proposed training will not, by itself, be considered sufficient justification for my transfer into the subject classification, nor will it insure that I pass the Civil Service examination, or be appointed to the classification.
2. During the period of reassignment for training purposes, I will neither gain nor accrue Civil Service seniority in the subject classification. Seniority will continue to accrue in my permanent classification.
3. During the period of reassignment, I will continue to be compensated within the salary range of my permanent classification.

Having read and understood the above, I do hereby give my consent to be temporarily reassigned for training purposes to perform the duties of the classification.

V. E. C.  
Signature

3/11/2020  
Date





## Long Beach Civil Service Commission

### REASSIGNMENT FOR TRAINING PROGRAM

#### Statement of Qualifications

NAME OF PARTICIPANT: <u>Victor E. Garcia</u>	DATE <u>03/11/2020</u>
PRESENT JOB TITLE: <u>General Maintenance Assistant</u>	
SOCIAL SECURITY NUMBER: _____	
REASSIGNMENT FOR TRAINING TO THE DUTIES OF: <u>Accounting Clerk</u>	

INSTRUCTIONS: The information you provide will be used to insure that you will meet the minimum requirements for the job when you complete your training assignment. Please answer the questions below as fully as possible, showing all experience or education you have had which will help you to meet the minimum requirements shown on the attached sheet (attach additional sheets if necessary.)

1. Please list any courses, degrees or training programs completed which have prepared you for the job in which to train. Be sure to include the name of the school or organization, dates and duration, as appropriate.
  - Port of Long Beach Commissioners Office- Transitional duty- Digitally organizing and filing paperwork on to the departments One Drive. - 3 Months
  - Port of Long Beach Environmental Planning Department- Transitional duty- Training on invoices and contracts. 6 Months
  - City of Long Beach - Civil Service Department- Transitional duty- Operating the front desk.- 3 Months
2. Please list any experience you have had which has prepared you for the job in which you wish to train. Be sure to include employer, dates employed and number of months or years employed.
  - Working with software such as Adobe pro, EDRMS, Word, Excel and Outlook to accomplish daily tasks.
  - Maintaining electronic and physical files
  - Review and process invoices for contracts including review of billing information and contract expiration dates.
  - Create requisitions, blanket purchase orders, and releases in Munis. Analyzing invoices and related documents.
  - Working with NEO GOV to assist analysts and and public with inquiries on available postitions with in the city.
  - Compiling information for use in reports and presentations.

# Victor E. Garcia

Phone: [REDACTED]

Email: [REDACTED]

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**OBJECTIVE:** An experienced, hard-working, dedicated, skilled, and result-oriented City employee is seeking a Reassignment for Rehabilitation and/or Training Assignment as an administrative assistant/clerk typist where I can thrive, support the strategic plan and operations of the department.

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## TRANSFERRABLE SKILLS AND ABILITIES:

- Strong customer service and organizational skills
  - Strong Microsoft Suite Office product skills: Word (Advance); Excel (Intermediate), Outlook (Advance)
  - Adobe PRO (Advance)
  - EDRMS (Advance)
  - LB Coast/Munis (Finance) – (Intermediate to Advance)
  - Basic clerical skill sets: Answering phone, taking messages, greeting customers, typing, faxing, copying, mail distribution
- 

## WORK EXPERIENCE

3/2016 to Present

Port of Long Beach-Harbor (Maintenance)  
725 Harbor Plaza Drive, Long Beach CA 90802  
**Position: General Maintenance Assistant**

Duties included but not limited to: Tile & carpet Installation; dry wall installation and repairs; prep and finish painting; concrete forms and rebar layout and installation; maintain multiple harbor facilities and tenant facilities; communicate and provide customer service to internal and external customers  
Lead personnel in training Job Corps summer interns

4/2019 to Present

## CITY OF LONG BEACH – TRANSITIONAL DUTY ASSIGNMENTS

### Port of Long Beach – Harbor Commissioner – Executive Office

Duties included but not limited to:

Scanning and digitally organizing documents in Chronological order; set-up and organized shared Drives; provided support to the Port's Protocol Officer answering phones, directing calls, taking Messages; creating spreadsheets, etc.

### Port of Long Beach – Government Affairs Office

Duties included but not limited to: Answering phones, taking messages, greeting customers, typing and filing.

### Port of Long Beach- Environmental Planning Office

Duties included but not limited to: Reviewed and Processed invoices for current contracts; maintained Records electronically and physically; assisted with Contract administration amending and adding Criteria for contracts; scanned and digitally organized documents in chronological order into EDRMS (Electronic Digital Records Management System); answering and screening calls; distributed mail

### City of Long Beach – Civil Service Department (Current Assignment)

Duties include not but limited to: Screening calls; responding to inquires; direct clients to the single point of contact for recruitments, postings, tests; assist both internal and external customer.

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EDUCATION:

- High School Graduate
  - LBCC A Plus Certification – Introduction into IT
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Reference available upon request



March 11, 2020

To Whom It May Concern,

Victor Garcia was assigned to the Environmental Planning Division at the Port of Long Beach from July of 2019 to January of 2020. During his six months with the Division, Victor demonstrated a level of professionalism and an eagerness to learn that was commendable. I was most impressed with Victor's desire and ability to learn new administrative and financial skills in order to further his career with the City.

The entire team was sad to see Victor go when he was transitioned out of the Division. Without hesitation, I would welcome him back to the Environmental Planning Division and recommend him to other City Departments.

Regards,

Matthew Arms

Acting Director of Environmental Planning



March 11, 2020

**RE: Letter of Recommendation for Mr. Victor Garcia**

To Whom It May Concern:

I had the pleasure of working with Victor Garcia while he was assigned to the Environmental Planning Division (Division) in the City of Long Beach Harbor Department (Port of Long Beach) from July 2019 to January 2020. During this time, Victor was responsible for providing general administrative office support to the Division, including the review of invoices received for services performed by various environmental consultants and contractors, ensuring their accuracy and preparation for submittal to the Finance Division for payment. This requires a high-level of attention to detail and proficiency with numbers, which Victor aptly demonstrated.

In addition, Victor is pleasant and has a positive attitude towards his work—he is always eager to learn and add to his skill set. He is well-organized and takes the time to ensure his work is thorough and completed on time. With these traits, I highly recommend Victor Garcia and am confident he will make an immediate and positive impact on any team.

If you have any questions, please feel free to contact me at [allyson.teramoto@polb.com](mailto:allyson.teramoto@polb.com) or 562.283.7100.

Respectfully,

Allyson Teramoto  
Manager, CEQA/NEPA Practives  
City of Long Beach Harbor Department | Port of Long Beach