



Date: February 17, 2021
To: Civil Service Commission
From: Desiree Davalos, Personnel Analyst
Subject: **REQUEST TO APPROVE REVISED CLASSIFICATION SPECIFICATION – ACCOUNTANT I-III**

On February 9, 2021, the Civil Service Department received correspondence from Fred Verdugo, Acting Director of Human Resources, requesting Civil Service Commission approval of the revised classification specification for Accountant I-III. Staff has reviewed this request and recommends the approval of the revisions to the classification specification, in accordance with Article XI, Section 1101 (d) of the City Charter.

Facts for Consideration:

- The classification of Accountant I-III can be found in the Financial Management, Airport, Energy Resources, Health and Human Services, Harbor, Public Works, Water, and Technology and Innovation Departments.
- The Classification Specification of Accountant I-III was adopted June 1, 1982.
- The proposed changes to the Accountant I-III classification specification are as follows:
 - **Examples of Duties Section:** Updated current range of duties and responsibilities as stated on past job bulletins and in conjunction with industry standards. All updates have been reviewed by all hiring departments listed above, the Human Resources Department, and Association of Machinists and Aerospace Workers (IAMAW).
 - Removed outdated duties and added current responsibilities.
 - **Minimum Qualifications:** Updated the requirements in conjunction with past recruitments, with specific updated option B to include:
 - Bachelor's Degree from an accredited college or university in Business Administration, Finance or a closely related field and the completion of a minimum of 21 units in Accounting.
 - **Knowledge, Skills, and Abilities:** Added Knowledge, Skills, and Abilities (KSA) section to clarify KSA requirements for the positions.

- Included updated language regarding “Proficiency in the operation of a computer including a working knowledge of spreadsheets.” And “Knowledge of Generally Accepted Accounting Principles (GAAP) and practices.”
- Staff worked with the Financial Management, Airport, Energy Resources, Health and Human Services, Harbor, Public Works, Water, and Technology and Innovation Departments on the proposed changes to the Accountant I-III specification.
- Staff has completed its meet and confer obligation on December 2, 2020 and December 15, 2020 with the International Association of Machinists and Aerospace Workers (IAMAW) union regarding the proposed changes
- All potential hiring departments, Human Resources Department, and the International Association of Machinists and Aerospace Workers (IAMAW) Representatives, have been informed that this request is on today’s agenda and representatives from the Financial Management Department and the Human Resources Department will be present to respond to any questions from the Civil Service Commission.

Date: February 9, 2021

To: Civil Service Commission

From: Fred Verdugo, Acting Director of Human Resources For: 

Subject: **CLASSIFICATION SPECIFICATION UPDATE – ACCOUNTANT**

Attached for your consideration is an update to the Accountant Classification Specification. The respective departments identified a need to update the classification specification to maintain consistency with recent Civil Service job bulletins. Minor changes were made throughout the classification specification to modernize the language. The Example of Duties was revised to reflect the current duties of the classification. The Minimum qualifications requirement for education, training, and experience was changed to include a bachelor's degree from an accredited college or university in Business Administration, Finance, or a closely related field and the completion of a minimum of 21 units in Accounting. Additionally, the classification specification now includes a Knowledge, Skills, and Abilities statement.

Human Resources staff worked with Civil Service and corresponding departments to complete the meet and confer process. Having completed the meet and confer obligation with the pertinent association, we are now requesting that the Commission adopt the Accountant classification specification changes as outlined for your review and approval.

Should you have any questions regarding this item, please contact Khristina Coston, Human Resources Officer at (562) 570-6440.

FB:DA:KC:BD

Attachments:

Accountant Classification Specification

cc:

Dana Anderson, Acting Deputy Human Resources Director
Khristina Coston, Human Resources Officer

February 8, 2021

VIA Email: agunckel947@gmail.com

Ashley Gunkel, Business Representative
International of Machinists and Aerospace Workers (IAMAW)
District Lodge 947
535 W. Willow Street
Long Beach, CA 90806

Subject: Meet and Confer, December 2, 2020 and December 15, 2020

Reference: Accountant I-III, Revised Classification Specification and Job Opportunity Bulletin

Dear Ashley Gunkel:

On behalf of the Civil Service Commission, staff sent the proposed classification specification and job opportunity bulletin revisions for the Accountant I-III classification via electronic mail on **October 27, 2020** to the International Association of Machinists and Aerospace Workers (IAMAW) for review.

At IAMAW's request, and in accordance with Government Code Section 3505, the City of Long Beach (City) met and conferred with the association on **December 2, 2020 and December 15, 2020**. As a result of the held meet and confer and subsequent email follow up, it is the City's understanding that the concerns identified by IAMAW related to the changes to the Example of Duties and Minimum Requirements of the Accountant I-III classification have been addressed.

The proposed revisions to the classification specification have been agreed upon and now reflected in the current job opportunity bulletin. As such, this issue is considered closed. Accordingly, the City has fulfilled its meet and confer obligation with the IAMAW regarding changes to the Accountant I-III classification.

The final proposed Accountant I-III classification specification and the current job opportunity bulletin are attached for your reference.

Please feel free to contact me at (562) 570-6941, should you have any questions.

Sincerely,

Caprice McDonald

Caprice McDonald, Employment Services Officer
Employment Services Division, Civil Service Department

cc: Christina Pizarro Winting, Executive Director, Civil Service Department,
Elizabeth Calixtro, Human Resources Officer, Human Resources-Labor Relations
Christian Cambridge, Administrative Analyst, Human Resources - Labor Relations
Desiree Davalos, Personnel Analyst, Civil Service
Bertha De La Cruz, Personnel Analyst, Human Resources – Operations
Sandra Kennedy, Administrative Officer, Financial Management Department
Kenneth Bott, Administrative Officer, Water Department
Ken Walker, Acting Administrative Officer, Police Department
Nicole Gross, Administrative Officer, Technology and Innovation Department
Russ Ficker, Administrative Officer, Public Works Department
Sandy Witz, Administrative Officer, Harbor Department
Jodie Griner, Administrative Officer, Health and Human Services Department
Dale Worsham, Administrative Officer, Airport Department

Accountant I-III Meet and Confer
December 2, 2020
Virtual Web Meeting
Revised Classification Specification and Job Opportunity Bulletin

Attendees:

International Association of Machinists and Aerospace Workers:

Ashley Gunkel, Business Representative

Devin Ablard, Business Representative

Milton Duena, Business Representative

Civil Service:

Sheree Valdoria, Personnel Analyst

Desiree Davalos, Personnel Analyst

Caprice McDonald, Employment Services Officer

Human Resources:

Christian Cambridge, Administrative Analyst

Bertha De La Cruz, Personnel Analyst

Financial Management Department:

David Nakamoto, City Treasurer

Daniel Casey, Administrative Analyst

Sandra Kennedy, Administrative Officer

Ruby Carrillo-Quincey, City Controller

Accountant I-III Meet and Confer
December 15, 2020
Virtual Web Meeting
Revised Classification Specification and Job Opportunity Bulletin

Attendees:

Civil Service:

Sylvana Tamura, Personnel Analyst
Desiree Davalos, Personnel Analyst
Christina Winting, Executive Director

Human Resources:

Christian Cambridge, Administrative Analyst
Bertha De La Cruz, Personnel Analyst

Financial Management Department:

David Nakamoto, City Treasurer
Daniel Casey, Administrative Analyst
Sandra Kennedy, Administrative Officer
Ruby Carrillo-Quincey, City Controller

Water Department:

Yumina Eggleston, Senior Accountant

Police Department:

Leslie Bruce, Financial Services Officer

International Association of Machinists and Aerospace Workers:

Ashley Gunkel, Business Representative
Devin Ablard, Business Representative
Milton Duena, Business Representative

TITLE: ACCOUNTANT I-III

DEFINITION: Under general supervision, performs increasingly difficult and responsible accounting functions, statistical analyses and interpretations of information in the preparation and evaluation of fiscal reports, records, transactions, accounting systems and procedures.

DISTINGUISHING CHARACTERISTICS:

Grade Level I - Performs the routine duties of the classification.

Grade Level II - Performs the journey level duties of the classification.

Grade Level III - Performs the more complex and difficult duties of the classification and/or acts in a lead capacity over accountants and clerical personnel.

EXAMPLES OF DUTIES:

- Verifies, categorizes, posts, analyzes and reconciles revenue and expenditures to proper accounts;
- Ensures proper accounting for capital assets and expense and revenue accruals;
- Analyzes budget variances, projects estimated expenses, and prepares budget adjustments;
- May assist in the preparation of annual budget and maintenance of budgetary controls;
- Prepares financial statements;
- Prepares financial forecasts and models based on defined assumptions for revenue, expenditures, and cash flow;
- Prepares financial and statistical reports for management, federal, state, and regional utility agencies, and the public;
- Prepares and analyzes financial summaries, statements and reports in compliance with generally accepted accounting principles;
- May perform accounting functions specific to grant funded programs;
- May interpret and assist in implementing federal, state and local accounting requirements and guidance;
- May conduct internal and external audits;
- May interpret and implement leasing agreements for billing and collection;
- Conducts cost accounting, studies and surveys;
- Develops and implements accounting procedures and reports;
- Establish and maintain general and subsidiary ledgers and other accounting-records;
- Prepares vouchers, billings, and journal entries;

- Computes and distributes labor, material and overhead costs;
- Performs analysis of subagent contract reimbursement, budgetary compliance and adequate support of expenditure;
- May supervise, train and evaluate subordinate personnel;
- Performs other related duties as required.

MINIMUM QUALIFICATIONS:

Applicants must meet one of the following options:

A. Bachelor's Degree from an accredited college or university in Accounting

OR

B. Bachelor's Degree from an accredited college or university in Business Administration, Finance or a closely related field and the completion of a minimum of 21 units in Accounting.

OR

C. A current Board of Accountancy Certified Public Accountant (CPA) certificate

A valid driver's license, or the ability to arrange necessary and timely transportation for field travel, may be required for some assignments.

Some positions may require overtime, weekend and/or holiday hours.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Proficiency in the operation of a computer including a working knowledge of spreadsheets.
- Knowledge of Generally Accepted Accounting Principles (GAAP) and practices.

HISTORY:

Revision of classification specification date 11/09/1973.

Approval/Adoption Dates: 06/01/1982 – Human Resources Department

Revised: 02/17/2021