

City and County of San Francisco



Department of Human Resources

Edwin M. Lee  
Mayor

Micki Callahan  
Human Resources Director

**DATE:** April 12, 2013

**TO:** Department Heads  
Finance Officers  
Departmental Personnel Officers

**FROM:** Kate Howard, Mayor's Budget Director *KH*  
Micki Callahan, Human Resources Director *MC*

**SUBJECT:** FY 2013-14 & FY 2014-15 Budget Review  
Preliminary Position Classification Submission Requirements

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This year's budget process marks the first year in the two-year budget for all City Departments for Fiscal Years 2013-14 and 2014-15. Consistent with the *Mayor's Office Financial Targets and Policy Instructions*, this year's *ASO Preliminary Position Classification* process has been aligned with the budget planning process as required by the Mayor's Budget Office. As with the past year's process, the classification review of positions is moved to an earlier stage in the process and is expected to reduce redundancies in review when departments move to fill requisitions for positions approved through the budget process.

To begin this year's process, the Department of Human Resources (DHR), in collaboration with the Mayor's Budget staff, will review "new," "substituted," "deleted" and "reassigned" (including Transfers of Function) positions submitted as part of the budget process to determine whether each associated job classification is appropriate for the work being performed and the department's operational needs. With this in mind, DHR's Client Services Team will perform the preliminary classification process with particular scrutiny of a limited number of classification series. The focus of the process will be on the review and approval of classification use that results in increased numbers of employees at the entry level, when appropriate, followed by required journey level positions and a smaller number of employees in classifications at higher levels in the class series, including MCCP positions.

In an effort to simplify and streamline the classification review process, a new Job Description Form has been developed to replace the previously required Job Analysis Questionnaire (JAQ), Express Classification Form and Organizational Chart. The Job Description Form (see attached) will require a concise summary description of the particular position, information regarding the classification and number of employees supervised, the type and level of typical working relationships, and proposed minimum qualifications for the position. In addition to reducing the amount of classification documentation required for positions, DHR has reduced the number of classes for which any documentation is required to 19 classifications and the MCCP. The specific job codes that require classification documentation are as follows.

Preliminary Position Classification Submission Requirements

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Job Code	Title	Required Documentation
1408	Principal Clerk	Job Description Form
1410	Chief Clerk	Job Description Form
1424	Clerk Typist	Job Description Form
1426	Senior Clerk Typist	Job Description Form
1444	Secretary I	Job Description Form
1446	Secretary II	Job Description Form
1450	Executive Secretary I	Job Description Form
1452	Executive Secretary II	Job Description Form
1454	Executive Secretary III	Job Description Form
1632	Senior Account Clerk	Job Description Form
1634	Principal Account Clerk	Job Description Form
1654	Accountant III	Job Description Form
1657	Accountant IV	Job Description Form
1823	Senior Administrative Analyst	Job Description Form
1824	Principal Administrative Analyst	Job Description Form
1825	Principal Administrative Analyst II	Job Description Form
1844	Senior Management Assistant	Job Description Form
5502	Project Manager I	Project Manager Request Form
5504	Project Manager II	Project Manager Request Form
5506	Project Manager III	Project Manager Request Form
5508	Project Manager IV	Project Manager Request Form
All M CCP		Job Description Form

In order to facilitate review, departments should complete the Annual Salary Ordinance (ASO) Preliminary Approval Table (Budget Form 14 and Budget Form 15, attached) and provide a Job Description Form, if required, as soon as possible but no later than **April 30, 2013**. These forms should be submitted to your Mayor's Budget Analyst and to the Department of Human Resources at [FY2013-14\\_DHR-Annual-Prelim-Classification@sfgov.org](mailto:FY2013-14_DHR-Annual-Prelim-Classification@sfgov.org). Departmental Human Resources staff are encouraged to contact their DHR Client Services Analyst in advance of the departmental budget submission to begin the review of position requests as soon as practical.

Upon preliminary approval of "New" and "Substitute" positions, and any other position changes requiring a job code change, DHR will issue a **Classification Authorization Number** for each position reviewed and granted preliminary budget approval. The Classification Authorization Number, when later entered on a Request to Fill the position, will serve as notice to DHR that the position has already been reviewed and approved, and no further classification documentation will be required.

Please see the attached instructions for completing and submitting the ASO Preliminary Approval Form for new and substitute positions in FY 2013-14 and FY 2014-15. Please contact your Client Services Analyst if you have any questions or need assistance with this process.

**INSTRUCTIONS**

**New Preliminary Classification Approval Process for the FY 2013-14 & FY 2014-15 Budget**

The form documents listed below are available on the Department of Human Resources (“DHR”) website at [www.sfgov.org/dhr](http://www.sfgov.org/dhr). Complete as directed and submit electronically via email to: [FY2013-14\\_DHR-Annual-Prelim-Classification@sfgov.org](mailto:FY2013-14_DHR-Annual-Prelim-Classification@sfgov.org) or in CD or DVD.

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***FY 2013-14 and FY 2014-15 Budgets – Submit Separate Forms for each Fiscal Year to the Mayor’s Budget Office & the Department of Human Resources:***

**1. Annual Salary Ordinance (ASO) Preliminary Approval Table (Ref. Budget Forms 14 & 15)**

List all “New,” “Substitute,” and “Reclassified” positions to be reviewed during the budget process on this table. In addition, list each position “Reassigned” to another City department or cost center in the section provided.

Enter the Department’s name at top of the table. In the body and corresponding columns, identify the specific Annual Salary Ordinance index code, budgeted class code and title, requested class and title, and number of positions FTEs and positions. An example is provided for you in the attached form. Please type over the example when inserting your department’s information.

***FY 2013-14 and FY 2014-15 Classification Approval Process – Submit Documents to DHR:***

**2. Job Description Form**

The Job Description Form is required only as indicated in the table below. Please note that a DHR Client Services Analyst may follow up with you for additional position information, if necessary. The Job Description Form is available at the DHR Website at: <http://www.sfdhr.org/>

Job Code	Title	Required Documentation
1408	Principal Clerk	Job Description Form
1410	Chief Clerk	Job Description Form
1424	Clerk Typist	Job Description Form
1426	Senior Clerk Typist	Job Description Form
1444	Secretary I	Job Description Form
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1454	Executive Secretary III	Job Description Form
1632	Senior Account Clerk	Job Description Form
1634	Principal Account Clerk	Job Description Form
1654	Accountant III	Job Description Form
1657	Accountant IV	Job Description Form
1823	Senior Administrative Analyst	Job Description Form
1824	Principal Administrative Analyst	Job Description Form
1825	Principal Administrative Analyst II	Job Description Form
1844	Senior Management Assistant	Job Description Form

Job Code	Title	Required Documentation
5502	Project Manager I	Project Manager Request Form
5504	Project Manager II	Project Manager Request Form
5506	Project Manager III	Project Manager Request Form
5508	Project Manager IV	Project Manager Request Form
All M CCP		Job Description Form

Complete one of these forms, if required for the job code, for each position when located in different programs, divisions, bureaus or units. You may use a single form, if required for the job code, when requesting more than one position as long as they are in the same class and budgeted in the same program, division, bureau or unit. Include the ASO program, sub-program, class, 1<sup>st</sup> step and 5<sup>th</sup> step biweekly salary information exactly as indicated in the ASO Section on the form.

**Example:**

Budget Information				
ASO Program: BGF Admin	ASO Subfund: 5A-AAA-AAP	Index Code:	Non-ASO: <input type="checkbox"/>	# of Position(s): 4
Budgeted Job Code and Rate: 1424 Clerk Typist (1596B1936)		Proposed/Recommended Job Code and Rate: 1446 Secretary II (1927B2342)		

**3. Organization Chart(s)**

No longer required.

**4. Previously TX'd Positions**

If DHR-Client Services has reviewed and approved TX'd positions for your department during the course of FY 2012-13, please contact your assigned Client Services Analyst to discuss whether the previously submitted documentation is adequate for preliminary approval of those positions during this budget process.

Please contact your designated DHR Client Services Analyst if you have any questions about how to complete or submit the required documentation.

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**ATTACHMENTS:**

- ASO Department Preliminary Approval Table – Budget Form 14 & 15
- Job Description Form