

State of California

MEMORANDUM

MM Ref. #: 89-14
Date: June 15, 1989

To: PERSONNEL MANAGEMENT LIAISONS

NOTE: Please distribute a copy of this memo and attachments to your Department Personnel Office.

From: Department of Personnel Administration
Classification and Compensation Division

Subject: Allocation Guides for Business Service Officer Series and related classes.

The classification changes affecting the Business Service Officer series and related classes were approved by the State Personnel Board on June 12, 1989. This memo is to notify you that the allocation guides which were distributed to all departments on April 17, 1989, are now considered final, and should be used when allocating positions to these classes.

Effective June 12, 1989, the MCR designations for the following classes are being changed:

	<u>FROM</u>	<u>TO</u>
Business Service Officer I (Specialist)	NONE	I
Business Service Officer I (Supervisor)	NONE	I
Business Service Officer II (Specialist)	NONE	II
Business Service Officer II (Supervisor)	NONE	II

The new class of Business Service Assistant (Specialist) is being designated MCR I; the designation for the Business Service Officer III and the Associate Business Management Analyst will remain MCR None.

If you have any questions regarding this memo, please call Duella Farmer on 324-9406. Questions relating to the allocation of individual positions should be directed to your DPA Department analyst.

Frank Tanaka
Frank Tanaka, Senior Section Manager
Classification and Compensation Division

State of California

M E M O R A N D U M

To: PERSONNEL MANAGEMENT LIAISONS Date: March 30, 1989
Reference Code: 89-14

THIS MEMORANDUM SHOULD BE DIRECTED TO PERSONNEL OFFICERS
AND BUDGET OFFICERS

FROM: Department of Personnel Administration

Subject: Working Agreement Between the Department of Finance and the
Department of Personnel Administration

The purpose of this memo is to inform all state departments that the Department of Personnel Administration and the Department of Finance jointly have adopted a policy to encourage communication between the two agencies in order to reinforce the positive aspects of shared information as it relates to their respective roles regarding position control of and allocation requests from state departments. This policy has been adopted, since it appears that, over time, the perceived roles of the two agencies have become less defined, and the communication between DOF and DPA analysts has tended to diminish somewhat.

Specific information with respect to this working agreement can be found in the attached memorandum which was sent to DOF budget analysts and DPA classification and compensation analysts. This memo further defines the two control agencies roles, and delineates some specific instances/criteria where closer coordination is expected.

In light of this closer coordination role between the two agencies, departments are urged to submit position allocation requests requiring both Forms 607 to DOF and 625 to DPA simultaneously. This should be done in the interest of expediting such requests, since it should no longer be expected that DPA will independently act on position allocation requests where coordination with Department of Finance is deemed necessary.

George P. Lloyd II

George P. Lloyd II, Chief
Classification and Compensation Division

Attachment





Date: March 13, 1989

To: Department of Finance Budget Staff
Department of Personnel Administration
Classification and Compensation Staff

Subject: Respective Roles and Working Relationships

The Department of Personnel Administration and the Department of Finance hereby jointly confirm their respective roles as they relate to evaluating agency position proposals.

While the DPA Analyst's role centers on the proper level and classification of the position(s), and the DOF Analyst's on the budgetary aspects of the request, many times their respective review functions involve common considerations such as the need for a new position and its impact on the existing staffing and organization of a department.

The Department of Personnel Administration Analyst reviews requests for the proper classification (level) and salary of the position. The Department of Finance Analyst reviews requests for: establishment, extension, deletion, or reclassification of positions; the need for the position(s); availability of funds now and in the future; conformity with State policy; and affect on the organization of the agency. Both analysts are generally involved with reorganization proposals.

In light of these frequent overlapping roles in reviewing requests affecting positions, an ongoing exchange of information between DPA and DOF is necessary.

Analysts in each department are expected to establish an ongoing working relationship with their counterparts by meeting with them when new persons come on board, changes in assignments occur, and as otherwise needed for sharing information and perspective regarding departmental assignment(s). Further, analysts are advised to contact their counterpart when reviewing the following types of requests from agencies, regardless of whether they are submitted via Forms 607, Forms 625, Budget Change Proposals, etc.:

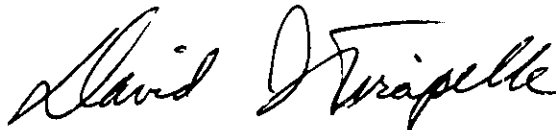
- a) Request for the establishment of a new class;
- b) Requests for new positions or upward reclassifications at the Staff Services Manager I and above (with special attention to managerial positions, such as upward reallocations of C.E.A. positions).

- c) Redirections of positions at the Staff Services Manager I level and above;
- d) Reorganizations;
- e) Any transaction when specifically requested by the DPA or DOF analyst.

To aid this closer coordination between the two departments, an updated listing of DPA/DOF analysts by departmental assignment will be exchanged regularly.



Russell S. Gould,
Chief Deputy Director,
Department of Finance



David J. Tirapelle,
Director,
Department of Personnel
Administration