**HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA**

**PERSONNEL COMMITTEE SPECIAL MEETING**

**Special Meeting Date: November 12, 2026**

**Time: 7:30 a.m.**

**Remote Participation Link:** https://us02web.zoom.us/j/88460095724

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## MEETING AGENDA

| | |
|---|---|
| **Item No. 1.:** | **Call to Order and Roll Call** |
| **Item No. 2.:** | **Approval of the Minutes of the Personnel Committee Special Meeting of October 14, 2026 (Action)** |
| **Item No. 3.:** | **Public Comment**<br>On matters not on the agenda |
| **Item No. 4.:** | **New Business** |
| **Item No.4-1.:** | Authorization to Cancel the Eligibility List for the Eligibility Technician Classification (Action) |
| **Item No.4-2:** | Adopt Job Classification Specifications: Housing Policy and Compliance Manager |
| **Item No.4-3:** | Adopt Job Classification Specifications: Account Specialist |
| **Item No.5.:** | **Adjournment** |

**(SEE GUIDELINES FOR PARTICIPATION ON NEXT PAGE)**

**HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA**

**PERSONNEL COMMITTEE SPECIAL MEETING**

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## GUIDELINES FOR PARTCIPATION

The Housing Commission's Personnel Committee (PC) meetings are held in person and open to the public. All reports and supporting material for the meeting are available on the internet at https://www.haca.net/housing-commission/ and in the Office of the Secretary at 22941 Atherton Street in Hayward. Members of the public may also participate virtually by Zoom. The Housing Commission does not guarantee that the public's Zoom access will be free from interruption or technical difficulties. Should Zoom not be available, the PC Chairperson may, at his/her discretion, continue the meeting in person if no Housing Commissioner is participating in the meeting through teleconference. If a Housing Commissioner is participating in the meeting through teleconference, and Zoom access is interrupted, then the PC shall take no further action in open session until Zoom access is restored.

In-person attendees who wish to speak on a matter are invited to request a speaker slip from the Housing Commission Secretary, fill it out, and return it to the Secretary as soon as possible. Remote attendees who wish to address the PC on Zoom should click on "raise hand" when the item they wish to speak on is called. The Secretary will activate and unmute speakers in turn. Written comments may be submitted at least 24 hours in advance of the meeting to melissat@haca.net. If emailing a written comment on a specific agenda item, please include your full name and the agenda item number. All attendees who wish to comment on a matter NOT on the PC's agenda must wait until the Chairperson calls the Public Comment item. Comments on specific agenda items will take place when the Chairperson calls for public comments on that agenda item. There is a time limit of three minutes for each public speaker. The Chairperson has the discretion to further limit this time if warranted by the number of public speakers.

Persons requesting accommodation for a disability should contact melissat@haca.net at least 24 hours prior to the meeting.

# PERSONNEL COMMITTEE
# MEETING MINUTES
# October 14, 2026

## HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA

## PERSONNEL COMMITTEE SUMMARY ACTION MINUTES

**Special Meeting Date/Time:** October 14, 2026, at 7:15 a.m.

**Meeting Location:** HACA Board Room, 22941 Atherton Street Hayward, CA 94541

**Remote Participation Link:** https://us02web.zoom.us/j/88460095724

### MEETING AGENDA

### Item No. 1: Call to Order and Roll Call

**Call to Order**
Chairperson Ballew called the Personnel Committee Special meeting of July 22, 2026 to order at 7:17 a.m.

**Roll Call**

| Commissioners Present: | Commissioners Excused: |
|---|---|
| Commissioner Pete Ballew (Chairperson) | Commissioner Mark Gerry |
| Commissioner Scott Sakakihara (Vice Chairperson) | |
| Commissioner Yang Shao | Commissioners Absent: |
| | Commissioner Angela Finley |

### Item No. 2: Approval of the Minutes of the Personnel Committee Special Meeting of July 22, 2026

Report received with no questions or comments from the Personnel Committee.

**Recommendation:**
Approve the minutes of the Personnel Committee Special Meeting of July 22, 2026 as presented.

**Motion/Second:**
Commissioner Shao (motion) and Commissioner Sakakihara (second).
Ayes: All.

Motion passed. **APPROVED AS RECOMMENDED.**

### Item No. 3: Public Comment - *On matters not on the agenda.*

None.

### Item No.4: New Business

### Item No.4-1: Adopt Job Classification Specifications: Compliance Analyst (Action)

Laura Broussard Rosen, Executive Director, presented the staff report. Ms. Broussard Rosen reported that the Housing Commission approved the addition of a Compliance Analyst position as part of the July 1, 2026-June 30, 2027 (FY26-27) operating budget. She explained that this position would focus on compliance issues directly related to program integrity, participant and owner compliance, and fraud recovery when applicable. Ms. Broussard Rosen added that addition of this position addresses a significant gap in capacity that HACA has had for some time now following the termination of the contract with the Alameda County District Attorney's office for an on-site Program Integrity Officer in the 2022-2023 fiscal year.

Ms. Broussard Rosen provided an overview of the position's primary responsibilities and explained that the Compliance Analyst would be a part of the team of analysts in the Administration Department, under the supervision of the Senior Administrative Analyst. Ms. Broussard Rosen recommended that the Personnel Committee adopt the proposed job classification specifications for this new position. Upon approval, staff will initiate plans to move forward with the recruitment for this position.

### Recommendation:

Adopt the proposed job specification for the Compliance Analyst classification as presented.

### Commission Discussion:

Chairperson Ballew asked whether the Compliance Analyst position would impact HACA's Section Eight Management Assessment Program (SEMAP) scores. Ms. Broussard Rosen explained that the position would not have a direct impact on HACA's SEMAP scores since the SEMAP performance indicators do not measure program integrity and related compliance functions. She stated that the position would have a significant impact in other critical areas related to program compliance. They also briefly discussed the on-site Program Integrity Officer assigned to HACA through the former contract with the Alameda County District Attorney's office.

### Motion/Second:

Commissioner Shao (motion) and Commissioner Sakakihara (second).
Ayes: All

Motion passed. **APPROVED AS RECOMMENDED.**

### Item No.4-2: Authorization to Cancel the Eligibility List for the Senior Administrative Analyst Classification (Action)

Laura Broussard Rosen presented the staff report. Ms. Broussard Rosen reported that Jennifer Cado, HACA's long-time Senior Administrative Analyst, retired and that staff worked with the recruitment consultant, CPS HR Consulting (CPS HR), to conduct a recruitment for this position. Ms. Broussard Rosen explained that although several candidates who had initial interviews achieved a score high enough for placement on the Senior Administrative Analyst eligibility list, staff determined that they did not adequately meet the needs for this position and will not advance to 2nd interviews.

Ms. Broussard Rosen also discussed the feedback that staff received from CPS HR regarding the challenges for this recruitment. She explained that the position had been restructured to include supervisory responsibilities and now has 4 direct reports but the salary range was not adjusted. She noted that staff will be reviewing the salary for this position and consider CPS HR's feedback before initiating a new recruitment. Ms. Broussard Rosen recommended that the Personnel Committee authorize the cancellation of the current eligibility list for the Senior Administrative Analyst classification.

**Recommendation:**
Authorize the cancellation of the current eligibility list for the Senior Administrative Analyst classification.

**Commission Discussion:**
Commissioner Shao asked whether HACA is seeking a candidate with experience comparable to that of the former Senior Administrative Analyst or would consider a candidate at a junior level. Ms. Broussard Rosen explained that the position requires a high level of experience to effectively supervise the team of analysts and provide the level of support that that the executive office needs.

Chairperson Ballew asked if there are others in the department who are currently in this position. Ms. Broussard Rosen explained that this is a single position and the person in this position will supervise the team of analysts.

**Motion/Second:**
Commissioner Sakakihara (motion) and Commissioner Shao (second).
Ayes: All

Motion passed. **APPROVED AS RECOMMENDED.**

**Item No.5:**
There being no further business to discuss, Chairperson Ballew adjourned the meeting at 7:28 a.m.

Respectfully submitted,

Melissa Taesali
Executive Assistant/Housing Commission Clerk

# NEW BUSINESS

## November 12, 2026

**HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA**

**PERSONNEL COMMITTEE AGENDA STATEMENT**

Meeting Date: November 12, 2026

| | |
|---|---|
| PC Agenda Item No. 4-1: | Authorization to cancel the eligibility list for the Eligibility Technician classification (Action) |
| Exhibits Attached: | Eligibility Technician Eligibility List |
| Recommendation: | Cancel the existing eligibility list for the Eligibility Technician classification. |

**BACKGROUND**

Article 8 of the HACA Personnel Rules provides guidelines for employment lists and the post-recruitment certification process. According to Section 8.4 (E)(1), eligibility lists remain valid for one year unless canceled or extended by the Personnel Committee.

In April 2026, HACA conducted a recruitment process for the Eligibility Technician position, resulting in an eligibility list approved by the Executive Director on May 28, 2026.

**DISCUSSION**

HACA currently has one remaining vacancy in the Eligibility Technician classification. The current Eligibility Technician eligibility list consists of 6 candidates. Candidate 4 was hired to fill a previous vacancy. Candidates 1 and 2 declined offers for the position. Based on the assessment of the remaining 3 candidates during the interview process, HACA has determined that they do not adequately meet the needs of the role.

Based on these recruitment outcomes, HACA recommends that the Personnel Committee cancel the current eligibility list for the Eligibility Technician classification. Cancelling the current eligibility list will allow HACA to conduct a new recruitment process and establish a new pool of candidates for the position.

Housing Authority of the County of Alameda
Human Resources Department

Housing Authority of the County of Alameda

# ELIGIBILITY LIST

## 3635 – Eligibility Technician

*List Expires: May 28, 2027*

| Candidate Name | Rank | Average Percentage |
|---|---|---|
| [redacted] | 1 | 90.06% |
| | 2 | 84.64% |
| | 3 | 79.82% |
| | 4 | 75.60% |
| | 5 | 74.10% |
| | 6 | 70.48% |

**Approved By:**

Laura Broussard Rosen

**Laura Broussard Rosen**
**Executive Director**

May 28, 2026

**Date Approved**

**HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA**

**PERSONNEL COMMITTEE**

**AGENDA STATEMENT**

Meeting Date: November 12, 2026

| | |
|---|---|
| PC Agenda Item No.4-2: | Adoption of Class Specifications: Housing Policy and Compliance Manager |
| Exhibits Attached: | Attachment A: Redline and Clean Versions of the Revised Class Specifications |
| Recommendation: | Adopt the Class Specifications for Housing Policy and Compliance Manager |

**BACKGROUND**

In May 2025, the Personnel Committee approved revisions to the Senior Administrative Analyst job classification specifications. The revisions updated the position's overall responsibilities and requirements for this job classification to ensure that they adequately met the needs of the agency. This update also reflected the supervisory responsibilities that were added to this position in the restructuring of the Administration Department in July 2021, which placed the team of Administrative Analysts under the supervision of the Senior Administrative Analyst.

Since that time, additional changes have occurred. A new Compliance Analyst management position was approved by the Housing Commission as part of the July 1, 2026-June 30, 2027 (FY26-27) operating budget, and the Senior Administrative Analyst retired in July 2026 creating a vacancy in this position. HACA subsequently worked with CPS HR Consulting (CPS HR) to conduct a recruitment for the Senior Administrative Analyst position in August 2026; however, it was unsuccessful.

**DISCUSSION**

Given the recent unsuccessful recruitment for the Senior Administrative Analyst role and the addition of a Compliance Analyst position, HACA has reevaluated the Senior Administrative Analyst position. Staff proposes changing the title of the Senior Administrative Analyst position to Housing Policy and Compliance Manager to better reflect the position's specific role and responsibilities within the Administration Department. The attached job classification shows the proposed changes to the title for this position as well as minor updates to clarify that the role is responsible for ensuring program compliance, including the functions of the new Compliance Analyst position.

In conjunction with these updates, staff will present a recommendation to the Housing Commission to increase the salary for the newly named Housing Policy and Compliance Manager

position from Range 33 ($112,982-$167,779) to Range 37 ($124,711-$185,197) on the management salary schedule. Although this role assumed supervisory responsibilities in the July 2021 restructuring and the Personnel Committee revised the job classification specifications in May 2025 to reflect these added responsibilities, the salary was not adjusted. The proposed salary range reflects the position's added supervisory responsibilities, the need for a high level of experience, and takes into consideration the feedback that HACA received from CPS HR regarding the challenges with the initial recruitment.

**RECOMMENDATION**

Staff recommends that the Personnel Committee adopt the proposed job classification specifications for the Housing Policy and Compliance Manager. Staff also requests that the Personnel Committee forward the recommendation to the Housing Commission to approve the salary adjustment for this position and assign the position to Range 37 in HACA's management salary schedule.

**HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA**

**PERSONNEL COMMITTEE**

**AGENDA STATEMENT**

Meeting Date: November 12, 2026

| | |
|---|---|
| PC Agenda Item No.4-3: | Adopt Job Classification Specifications: Account Specialist |
| Exhibits Attached: | Attachment B: Redline and Clean Versions of the Account Specialist Job Classification |
| Recommendation: | Approve the proposed revisions to the job classification specifications |

**BACKGROUND**

HACA's Finance Department currently has a team of 5 Account Specialists who perform a wide range of complex accounting functions for the agency including, payroll, accounts payable, accounts receivable, specialized housing program assistance payment processing, portability payments and other critical support functions. The Account Specialist job classification specifications were last updated in 2019.

In April 2026, HACA received requests from several Account Specialists for a review of their job classification. In response to these requests, HACA conducted a job classification analysis and determined that revisions to the Account Specialist job classification were needed to more accurately reflect the position's duties and responsibilities.

**DISCUSSION**

As the Accounts Specialist job classification is a represented position, staff held several meetings with SEIU Local 1021, which represents the HACA employee bargaining unit, to review proposed changes to the job classification specifications. SEIU Local 1021 has agreed to the following proposed changes to the classification specifications for this position as found in Attachment B.

- Expanding the definition and distinguishing features of the Accounts Specialist role to more accurately reflect the scope and complexity of the accounting support functions performed.
- Revising the essential duties and responsibilities of the Account Specialist position to reflect the current responsibilities of this position, including the use of technology, software, and accounting processes within the Finance Department.
- Updates to the knowledge, skills and abilities required for this role to reflect the current needs for this classification.
- Updates to the minimum qualifications for the position to adequately reflect the level of experience required for this role.

**RECOMMENDATION**

Staff recommends that the Personnel Committee adopt the proposed job classification specifications for the Account Specialist position. Upon approval by the Personnel Committee, staff will proceed with a recruitment process for this position.

# ATTACHMENT A

**PC Agenda Item No.4-1 : Adopt Job Classification Specifications: Housing Policy and Compliance Manager**

# ~~Senior Administrative Analyst~~Housing Policy and Compliance Manager

## Housing Authority of the County of Alameda

| | |
|---|---|
| **Department:** | Administration |
| **Unit:** | n/a |
| **Reports to:** | Executive Director or<br>Deputy Executive Director |
| **FLSA Status:** | Exempt |

| | |
|---|---|
| Required Licenses: | Possession of a California Driver's License |
| Required Certifications: | Training certifications as required by supervisor |

**DEFINITION/PURPOSE**:

To provide professional senior management assistance in the Administration Department by planning, coordinating and directing a wide range of high-level analytical, management, and technical assignments supporting HACA operations and programs and ensuring program compliance. This position provides highly responsible administrative staff assistance to the Executive Director and Deputy Executive Director.

**DISTINGUISHING FEATURES**:

The ~~Senior Administrative Analyst~~Housing Policy and Compliance Manager classification is in the Administration Department and is distinguished from other positions at the Housing Authority in that it is principally involved in the development and analysis of administrative programs, policies and procedures relating to the administration and operations of the Authority.

This professional level management classification is distinguished from the Administrative Analyst and Compliance Analyst classifications by the involvement in the development of strategies aligned with agency goals and by the assignment of the most complex, difficult, and sensitive assignments. The classification requires working knowledge of management principles, and the ability to exercise independent responsibility and judgment in conducting research, analysis and project management. The Housing Policy and Compliance Manager~~Senior Administrative Analyst~~ oversees all stages of the policy process, from research to recommendations, development, adoption, implementation, and evaluation.

**SUPERVISION RECEIVED AND EXERCISED:**

The Housing Policy and Compliance Manager~~Senior Administrative Analyst~~ classification receives administrative direction from the Executive Director or Deputy Executive Director and provides direct supervision to the Administrative Analyst and Compliance Analyst classifications.

**ESSENTIAL AND MARGINAL JOB FUNCTIONS:**
*Primary (essential) and less essential (marginal) responsibilities may include, but are not limited to, the following:*

**Essential Functions:**

1. Develop, plan, organize and coordinate various projects, programs, policies, procedures, and services for the executive leadership team and other management, as assigned.

2. Administer or manage specific housing-related projects, programs and/or services including but not limited to: Project-Based Voucher program, Housing Authority waitlists, Independent Entity for other Local Housing Authorities, and program-related audits.

3. Ensure housing program operations and procedures are compliant with applicable regulations and requirements, including but not limited to program integrity matters, fair housing, Section 504, Reasonable Accommodations, Violence Against Women Act (VAWA), and Limited English Proficiency (LEP), and perform~~ing~~ or assign~~ing~~ associated operational functions.

4. Identify, plan and manage the development and implementation of new or revised programs, systems, procedures, technology, and methods of operation with agency-wide impact or related housing programs.

5. Manage and coordinate agency reporting to HUD, ensuring compliance with all reporting requirements, including Section Eight Management Assessment Program (SEMAP), PHA Annual Plans and submissions of agency data in HUD reporting systems.

6. Manage and coordinate housing program data tracking, analysis and reporting, including preparing reports, documents, and presentations for internal and external use.

7. Manage and coordinate responses to internal and external requests for agency information, data, and/or reports, including requests related to the California Public Records Act (PRA) and Freedom of Information Act (FOIA) or other required agency reporting.

8. Provide staff assistance with the Authority's Housing Commission including conducting research, analysis and preparing and presenting staff reports and supporting materials regarding assigned areas of responsibilities.

9. Perform technical and complex research, analysis and evaluation in such areas as housing program development and operations, funding sources, policy and operational procedures, development and management systems.

10. Manage and/or prepare grant applications, including data and materials supporting proposals, and handle the details of grant administration including reporting requirements for contracts with federal, state and local agencies.

11. Conduct surveys and perform research and statistical analysis as requested; prepare related reports.

12. Act as an agency representative and liaison to various federal, local public agencies, resident and community organizations, and other stakeholders for coordination and management of interagency collaborations and to provide agency-related information.

13. Manage and coordinate agency-wide training and quality control reviews of operations.

14. Evaluate and comment on state and federal regulations and proposed legislation and evaluate the impacts to agency programs and operations, as assigned.

15. Plan and participate in the development and implementation of computer systems and software, as assigned.

16. Supervise and direct the work activities of assigned staff; prioritize and coordinate work assignments; review work for accuracy; recommend improvements in department workflow, procedures, and use of equipment and forms.

17. Participate in selecting, training, motivating, and evaluating assigned staff; provide or coordinate staff training; work with employees to correct deficiencies.

18. Address sensitive interactions with clients, the public, and external stakeholders and provide recommended solutions.

19. Participate in the development of the Housing Authority's budget and its administration.

**Marginal Functions for Both Classifications:**

1. Serve as the Authority's Section 504 coordinator.

2. Serve as a hearing officer for program applicants or participants.

3. Represent the Executive Director or Deputy Executive Director, or serve as the alternate on various boards, commissions, or councils, or external meetings, as assigned.

4. Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

The following is required for the Housing Policy and Compliance Manager ~~Senior Administrative Analyst~~ position:

**Knowledge of:**

- Principles of public and business administration
- Regulations and compliance requirements related to assisted housing programs and tenant relations activities
- Principles of research and analysis including standard statistical methods and procedures
- Organizational and management practices as applied to the analysis and evaluation of programs, policies and operational needs

- Grant and funding request preparation and reporting procedures
- Report and public information writing techniques
- Legislation and regulations related to assisted housing programs

**Ability to:**

- Manage and analyze complex data sets
- Independently operate a personal computer using the Authority's designated operating system and associated software including specialized and/or dedicated computer programs
- Manage and prioritize multiple, complex administrative duties simultaneously with minimal supervision
- Quickly adapt to changing priorities
- Establish and maintain accurate records
- Supervise, train and evaluate personnel as assigned
- Establish and maintain cooperative working relationships with those contacted in the course of work

## QUALIFICATIONS:

### Minimum Qualifications

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain knowledge and abilities would be:

A. Education

Possession of a Bachelor's Degree from an accredited college or university with major course work in public administration, management, public policy, business administration, sociology, planning, economics or a related field; **and**

B. Work Experience

Four (4) years of full-time professional experience in management working with public agencies, or other related industry, involving program and organizational analysis and administration and two (2) years in a supervisory capacity.

### Desirable Qualifications

A Master's Degree in a related field may be substituted for one year of the required work experience.

**QUALIFICATION REQUIREMENTS:**

To perform this job successfully, an individual must be able to perform each essential job function satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions. In addition, a driving record acceptable to the Housing Authority's insurance carrier must be maintained.

**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.

While performing the duties of this job, mobility within and outside the workplace is required, including the ability to drive an automobile. Manual dexterity is required to operate a computer. Good eyesight is required to read and write. Good hearing and speech are necessary to communicate with the public, co-workers, agency clients, and officials contacted in the normal course of work. Regular attendance is required. Must be able to handle stressful situations.

# Housing Policy and Compliance Manager

## Housing Authority of the County of Alameda

| | |
|---|---|
| **Department:** | Administration |
| **Unit:** | n/a |
| **Reports to:** | Executive Director or<br>Deputy Executive Director |
| **FLSA Status:** | Exempt |

| | |
|---|---|
| Required Licenses: | Possession of a California Driver's License |
| Required Certifications: | Training certifications as required by supervisor |

**DEFINITION/PURPOSE**:

To provide professional senior management assistance in the Administration Department by planning, coordinating and directing a wide range of high-level analytical, management, and technical assignments supporting HACA operations and programs and ensuring program compliance. This position provides highly responsible administrative staff assistance to the Executive Director and Deputy Executive Director.

**DISTINGUISHING FEATURES**:

The Housing Policy and Compliance Manager classification is in the Administration Department and is distinguished from other positions at the Housing Authority in that it is principally involved in the development and analysis of administrative programs, policies and procedures relating to the administration and operations of the Authority.

This professional level management classification is distinguished from the Administrative Analyst and Compliance Analyst classifications by the involvement in the development of strategies aligned with agency goals and by the assignment of the most complex, difficult, and sensitive assignments. The classification requires working knowledge of management principles, and the ability to exercise independent responsibility and judgment in conducting research, analysis and project management. The Housing Policy and Compliance Manager oversees all stages of the policy process, from research to recommendations, development, adoption, implementation, and evaluation.

**SUPERVISION RECEIVED AND EXERCISED:**

The Housing Policy and Compliance Manager classification receives administrative direction from the Executive Director or Deputy Executive Director and provides direct supervision to the Administrative Analyst and Compliance Analyst classifications.

**ESSENTIAL AND MARGINAL JOB FUNCTIONS:**
*Primary (essential) and less essential (marginal) responsibilities may include, but are not limited to, the following:*

**Essential Functions:**

1. Develop, plan, organize and coordinate various projects, programs, policies, procedures, and services for the executive leadership team and other management, as assigned.

2. Administer or manage specific housing-related projects, programs and/or services including but not limited to: Project-Based Voucher program, Housing Authority waitlists, Independent Entity for other Local Housing Authorities, and program-related audits.

3. Ensure housing program operations and procedures are compliant with applicable regulations and requirements, including but not limited to program integrity matters, fair housing, Section 504, Reasonable Accommodations, Violence Against Women Act (VAWA), and Limited English Proficiency (LEP), and perform or assign associated operational functions.

4. Identify, plan and manage the development and implementation of new or revised programs, systems, procedures, technology, and methods of operation with agency-wide impact or related housing programs.

5. Manage and coordinate agency reporting to HUD, ensuring compliance with all reporting requirements, including Section Eight Management Assessment Program (SEMAP), PHA Annual Plans and submissions of agency data in HUD reporting systems.

6. Manage and coordinate housing program data tracking, analysis and reporting, including preparing reports, documents, and presentations for internal and external use.

7. Manage and coordinate responses to internal and external requests for agency information, data, and/or reports, including requests related to the California Public Records Act (PRA) and Freedom of Information Act (FOIA) or other required agency reporting.

8. Provide staff assistance with the Authority's Housing Commission including conducting research, analysis and preparing and presenting staff reports and supporting materials regarding assigned areas of responsibilities.

9. Perform technical and complex research, analysis and evaluation in such areas as housing program development and operations, funding sources, policy and operational procedures, development and management systems.

10. Manage and/or prepare grant applications, including data and materials supporting proposals, and handle the details of grant administration including reporting requirements for contracts with federal, state and local agencies.

11. Conduct surveys and perform research and statistical analysis as requested; prepare related reports.

12. Act as an agency representative and liaison to various federal, local public agencies, resident and community organizations, and other stakeholders for coordination and management of interagency collaborations and to provide agency-related information.

13. Manage and coordinate agency-wide training and quality control reviews of operations.

14. Evaluate and comment on state and federal regulations and proposed legislation and evaluate the impacts to agency programs and operations, as assigned.

15. Plan and participate in the development and implementation of computer systems and software, as assigned.

16. Supervise and direct the work activities of assigned staff; prioritize and coordinate work assignments; review work for accuracy; recommend improvements in department workflow, procedures, and use of equipment and forms.

17. Participate in selecting, training, motivating, and evaluating assigned staff; provide or coordinate staff training; work with employees to correct deficiencies.

18. Address sensitive interactions with clients, the public, and external stakeholders and provide recommended solutions.

19. Participate in the development of the Housing Authority's budget and its administration.

**Marginal Functions for Both Classifications:**

1. Serve as the Authority's Section 504 coordinator.

2. Serve as a hearing officer for program applicants or participants.

3. Represent the Executive Director or Deputy Executive Director, or serve as the alternate on various boards, commissions, or councils, or external meetings, as assigned.

4. Perform related duties as assigned.

## KNOWLEDGE AND ABILITIES:

The following is required for the Housing Policy and Compliance Manager position:

**Knowledge of:**

- Principles of public and business administration
- Regulations and compliance requirements related to assisted housing programs and tenant relations activities
- Principles of research and analysis including standard statistical methods and procedures
- Organizational and management practices as applied to the analysis and evaluation of programs, policies and operational needs

- Grant and funding request preparation and reporting procedures
- Report and public information writing techniques
- Legislation and regulations related to assisted housing programs

**Ability to:**

- Manage and analyze complex data sets
- Independently operate a personal computer using the Authority's designated operating system and associated software including specialized and/or dedicated computer programs
- Manage and prioritize multiple, complex administrative duties simultaneously with minimal supervision
- Quickly adapt to changing priorities
- Establish and maintain accurate records
- Supervise, train and evaluate personnel as assigned
- Establish and maintain cooperative working relationships with those contacted in the course of work

## QUALIFICATIONS:

### Minimum Qualifications

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain knowledge and abilities would be:

A. Education

Possession of a Bachelor's Degree from an accredited college or university with major course work in public administration, management, public policy, business administration, sociology, planning, economics or a related field; **and**

B. Work Experience

Four (4) years of full-time professional experience in management working with public agencies, or other related industry, involving program and organizational analysis and administration and two (2) years in a supervisory capacity.

### Desirable Qualifications

A Master's Degree in a related field may be substituted for one year of the required work experience.

**QUALIFICATION REQUIREMENTS:**

To perform this job successfully, an individual must be able to perform each essential job function satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions. In addition, a driving record acceptable to the Housing Authority's insurance carrier must be maintained.

**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.

While performing the duties of this job, mobility within and outside the workplace is required, including the ability to drive an automobile. Manual dexterity is required to operate a computer. Good eyesight is required to read and write. Good hearing and speech are necessary to communicate with the public, co-workers, agency clients, and officials contacted in the normal course of work. Regular attendance is required. Must be able to handle stressful situations.

# ATTACHMENT B

**PC Agenda Item No.4-3: Adopt Job Classification Specifications: Account Specialist**

# Account Specialist

**HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA** | Job Code 3622

| | |
|---|---|
| **Department(s):** | Finance |
| **Unit(s):** | Accounting |
| **Reports to:** | Finance Director, Financial Accounting Manager and/or Accountant |
| **FLSA Status:** | Non-exempt |
| **Represented:** | SEIU Local 1021 |

| | |
|---|---|
| **Required Licenses:** | Possession of a California Driver's License |
| **Required Certifications:** | Training certifications as required by supervisor |

**DEFINITION/PURPOSE**:

Under general supervision, to perform advanced para-professional accounting ~~provide a wide variety of fiscal and/or statistical data and control~~support functions involving complex fiscal, statistical, accounts payable, accounts receivable, billing, reconciliation, documentation, and control activities; to independently review, analyze, reconcile, and resolve complex accounting support issues; to provide specialized program-accounting coordination related to Housing Authority payment and billing processes; and to perform related duties as assigned.

**DISTINGUISHING FEATURES**:

The Account Specialist classification performs ~~is considered to be a~~ para-professional ~~classification that performs a wide variety of~~ accounting support duties requiring technical skill, independent judgment, knowledge of accounting systems and program workflows, and responsibility for assisting with payment, billing, reconciliation, documentation, and system-related discrepancies. The Account Specialist classification supports accounts payable, accounts receivable, payroll, deposits, billing, vendor payments, portability billing, Housing Choice Voucher/Section 8 program payment processes, and related financial support activities. The Account Specialist is distinguished from the Accountant classification in that it performs accounting support and control functions rather than professional accounting analysis, audit, budget, or financial reporting responsibilities assigned to professional accounting classifications.~~is distinguished from the Accountant classification regarding the performance of support functions as compared to professional accounting tasks performed by the Accountant classification.~~

**SUPERVISION RECEIVED AND EXERCISED:**

The Account Specialist classification receives direction and supervision from the Finance Director, Accountant, Financial Accounting Manager, or other assigned supervisory or management staff. The classification does not exercise formal supervisory authority. Positions may assist with training and provide technical support.

**ESSENTIAL AND MARGINAL JOB FUNCTIONS:**

*Primary (essential) and less essential (marginal) responsibilities may include, but are not limited to, the following:*

**Essential Functions:**

1. Perform complex ~~Maintain accounts receivables, accounts payables~~ maintenance of accounts receivable, accounts payable, housing assistance payment processing, payroll, deposits, vendor payments, portability billing, and related accounting support ~~financial~~ records.

2. Review, analyze, reconcile, and resolve complex payment, billing, account, and transaction discrepancies, including discrepancies affecting landlord payments, participant payments, vendor payments, incoming portability billing, and other housing authority transactions.

3. Prepare, review, and process accounting system input documents journal~~journal~~ entries payment forms, check runs, billing statements, deposits, and related financial records.

~~and other accounting system input documents.~~

~~3. Determine~~Review and verify ~~appropriate~~ assignment categories, accounting codes, ~~appropriate assignment categories for~~ expenditure and revenue categories, ~~funding streams,~~ and general ledger transaction classifications for accuracy, and refer discrepancies or complex matters to the supervisor for resolution. ~~revenue and general ledger transactions.~~

4.

~~4.~~5. Review and validate supporting documentation for payments, billing, vendor setup, ownership changes, tax records, W-9 forms, 1099-related records, property records, IRS documentation, HUD forms, Housing Assistance Payment (HAP) contracts, portability documents, and other records supporting accounting transactions.

6. Perform advanced account reconciliation, month-end review, discrepancy analysis, missing-document identification, unsupported payment analysis, retroactive payment adjustment review, and correction of inaccurate or incomplete financial records.

~~5. Prepare and process payroll including the audit of timesheets, posting of accurate pay codes, hours worked and benefits.~~

7. Use accounting, housing, records management, spreadsheet, and related software systems to research transactions, maintain data accuracy, identify errors, prepare reports, and make authorized corrections.

8. Coordinate accounting support activities with program staff, landlords, vendors, participants, financial institutions, other housing authorities, and internal departments to resolve payment, billing, documentation, and reconciliation issues.

9. Communicate accounting requirements, documentation needs, payment issues, and billing concerns clearly to staff and external contacts.

10. Assist in training and provide technical support.

~~6. Process purchase orders, assign accounting codes and verify invoices prior to initiating~~

~~payments and disbursements.~~

~~7.~~11. Satisfactorily complete any required training courses and pass any associated exams in order to complete the training curriculum.

**Marginal Functions:**

1. Consult with bank personnel, contractors, vendors, landlords, other housing authorities, and other external contacts ~~and others~~ to gather information and to resolve imbalances, discrepancies, documentation issues, and payment or billing concerns. ~~and discrepancies.~~

2. Prepare and maintain ~~a variety of~~ statistical and financial ~~data for governmental and internal~~ reports.

3. ~~Answer~~ Respond to questions regarding accounts receivable procedures, rent collections, HAP contract payments, accounts payable, vendor payments, direct deposits, portability billing, and related accounting processes.

4. Review daily, monthly, and periodic transaction reports for accuracy, completeness, and required follow-up.

5. Coordinate assigned accounting activities with other staff and assist with cross-training or coverage of related accounting desks.

~~3.~~6. Perform other duties as assigned.

**KNOWLEDGE AND ABILITIES:**

The Account Specialist classification requires the:

**Knowledge of:**

- Principles and practices of financial record keeping~~-~~, fiscal control, and accounting support ~~and~~ procedures.
- Accounting support methods involving accounts receivable, accounts payable, payroll, deposits, vendor payments, billing, reconciliations, and payment processing.
- Elementary and intermediate accounting principles and methods applicable to para-professional accounting support work.
- Housing Authority payment and billing processes, including HAP contract payments, portability billing, vendor payments, participant payments, and related financial transactions.
- Methods for reviewing, reconciling, and resolving complex account, payment, billing, and transaction discrepancies.
- Financial documentation requirements, including W-9 forms, 1099-related records, IRS records, ownership documentation, property records, HUD forms, HAP contracts and related supporting records.

- Accounting, housing, records management, spreadsheet, and related software systems used to process, review, reconcile, and correct financial transactions.
- Advanced spreadsheet functions and data review methods, including PivotTables, XLOOKUP, conditional formatting, formulas and functions, data validation, filtering and sorting large data sets, reconciling reports from multiple sources, identifying duplicate or missing records, and preparing summary reports used to identify unsupported payment amounts, discrepancies, and reporting issues.
- Customer service and communication methods for working with staff, vendors, landlords, participants, financial institutions, other housing authorities, and the general public.
- English grammar ~~and punctuation~~, punctuation, and business writing practices.
- Basic internal control concepts related to accuracy, documentation, segregation of duties, payment authorization, and record integrity.

- ~~Elementary accounting principles and methods~~
- ~~General customer service skills~~
- ~~Data entry methods~~
- ~~Basic mathematics~~

**Ability to:**

- Perform advanced para-professional accounting support work accurately and independently.
- Analyze, reconcile, and resolve complex financial, payment, billing, and documentation discrepancies.
- Use independent judgment in carrying out instructions involving financial records, payment processing, billing, account reconciliation, and system corrections.
- Apply accounting codes, expenditure and revenue categories, funding streams, and transaction classifications accurately.
- Review and interpret financial, tax, ownership, vendor, housing, and payment-support documentation.
- Use accounting systems, housing systems, electronic records systems, spreadsheets, and related software to research transactions, maintain records, prepare reports, and identify errors.
- Use advanced spreadsheet tools, including PivotTables, XLOOKUP, conditional formatting, formulas and functions, data validation, filters, sorting, duplicate identification, and multi-source report comparison to organize data, identify missing records, verify payment amounts, reconcile accounts, and prepare reports.
- Communicate effectively both orally and in writing with internal staff and external contacts.
- Explain accounting procedures, documentation requirements, payment issues, and billing concerns clearly to non-accounting staff and external parties.
- Assist in training and provide technical assistance to other staff.
- Maintain accurate records and prepare financial, statistical, and reconciliation reports.

- Prioritize work, meet deadlines, handle confidential information, and maintain attention to detail.
- ~~Understand and follow complex directions~~
- ~~Use independent judgment in carrying out instructions concerning financial records~~
- ~~Accurately maintain records and prepare financial reports~~
- ~~Effectively interact with those contacted in the course of business and other staff~~
- Successfully complete any required training courses and pass associated training examinations.
- Effectively interact with those contacted in the course of business and other staff.

~~Maintain attention to detail~~

**MINIMUM QUALIFICATIONS:**

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. ~~A t~~Typical ways to obtain the knowledge and abilities would be:

~~1. Housing Authority internal candidates only: Two (2) years in the classification of Administrative Clerk in the Housing Authority service and demonstrated knowledge of elementary accounting principles.~~

1. Possession of an associate degree or higher from an accredited college or university with coursework in accounting, bookkeeping, business administration, finance, public administration, or a closely related field; AND Three years of increasingly responsible experience performing accounting support, accounts payable, accounts receivable, payroll, billing, payment processing, reconciliation, fiscal recordkeeping, or related financial support duties, including at least one year performing complex reconciliation, payment review, billing review, or system-based accounting support work; OR

~~Education equivalent to the completion of the twelfth (12th) grade and one year of college level elementary accounting courses, **and** two (2) years of increasingly responsible experience administering accounts and compiling a wide variety of fiscal or statistical data and controls.~~

2. Four years of increasingly responsible experience performing accounting support, accounts payable, accounts receivable, payroll, billing, payment processing, reconciliation, fiscal recordkeeping, or related financial support duties, including at least one year performing complex reconciliation, payment review, billing review, or system-based accounting support work.

**QUALIFICATION REQUIREMENTS:**

To perform the duties of this classification successfully, an individual must be able to perform each essential job function satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability required for the Housing Technician. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential job functions. In addition, a driving record acceptable to the Housing Authority's insurance carrier must be maintained.

**PHYSICAL DEMANDS:**

# Account Specialist

**HOUSING AUTHORITY OF THE COUNTY OF ALAMEDA** | Job Code 3622

| | |
|---|---|
| **Department(s):** | Finance |
| **Unit(s):** | Accounting |
| **Reports to:** | Finance Director, Financial Accounting Manager and/or Accountant |
| **FLSA Status:** | Non-exempt |
| **Represented:** | SEIU Local 1021 |

| | |
|---|---|
| **Required Licenses:** | Possession of a California Driver's License |
| **Required Certifications:** | Training certifications as required by supervisor |

**DEFINITION/PURPOSE**:

Under general supervision, to perform advanced para-professional accounting support functions involving complex fiscal, statistical, accounts payable, accounts receivable, billing, reconciliation, documentation, and control activities; to independently review, analyze, reconcile, and resolve complex accounting support issues; to provide specialized program-accounting coordination related to Housing Authority payment and billing processes; and to perform related duties as assigned.

**DISTINGUISHING FEATURES**:

The Account Specialist classification performs para-professional accounting support duties requiring technical skill, independent judgment, knowledge of accounting systems and program workflows, and responsibility for assisting with payment, billing, reconciliation, documentation, and system-related discrepancies. The Account Specialist classification supports accounts payable, accounts receivable, payroll, deposits, billing, vendor payments, portability billing, Housing Choice Voucher/Section 8 program payment processes, and related financial support activities. The Account Specialist is distinguished from the Accountant classification in that it performs accounting support and control functions rather than professional accounting analysis, audit, budget, or financial reporting responsibilities assigned to professional accounting classifications.

**SUPERVISION RECEIVED AND EXERCISED:**

The Account Specialist classification receives direction and supervision from the Finance Director, Accountant, Financial Accounting Manager, or other assigned supervisory or management staff. The classification does not exercise formal supervisory authority. Positions may assist with training and provide technical support.

**ESSENTIAL AND MARGINAL JOB FUNCTIONS:**

*Primary (essential) and less essential (marginal) responsibilities may include, but are not limited to, the following:*

**Essential Functions:**

1. Perform complex maintenance of accounts receivable, accounts payable, housing assistance payment processing, payroll, deposits, vendor payments, portability billing, and related accounting support records.

2. Review, analyze, reconcile, and resolve complex payment, billing, account, and transaction discrepancies, including discrepancies affecting landlord payments, participant payments, vendor payments, incoming portability billing, and other housing authority transactions.

3. Prepare, review, and process accounting system input documents journal entries payment forms, check runs, billing statements, deposits, and related financial records.

4. Review and verify assignment categories, accounting codes, expenditure and revenue categories, and general ledger transaction classifications for accuracy, and refer discrepancies or complex matters to the supervisor for resolution.

5. Review and validate supporting documentation for payments, billing, vendor setup, ownership changes, tax records, W-9 forms, 1099-related records, property records, IRS documentation, HUD forms, Housing Assistance Payment (HAP) contracts, portability documents, and other records supporting accounting transactions.

6. Perform advanced account reconciliation, month-end review, discrepancy analysis, missing-document identification, unsupported payment analysis, retroactive payment adjustment review, and correction of inaccurate or incomplete financial records.

7. Use accounting, housing, records management, spreadsheet, and related software systems to research transactions, maintain data accuracy, identify errors, prepare reports, and make authorized corrections.

8. Coordinate accounting support activities with program staff, landlords, vendors, participants, financial institutions, other housing authorities, and internal departments to resolve payment, billing, documentation, and reconciliation issues.

9. Communicate accounting requirements, documentation needs, payment issues, and billing concerns clearly to staff and external contacts.

10. Assist in training and provide technical support.

11. Satisfactorily complete any required training courses and pass any associated exams in order to complete the training curriculum.

**Marginal Functions:**

1. Consult with bank personnel, contractors, vendors, landlords, other housing authorities, and other external contacts to gather information and to resolve imbalances, discrepancies, documentation issues, and payment or billing concerns.

2. Prepare and maintain statistical and financial reports.

3. Respond to questions regarding accounts receivable procedures, rent collections, HAP contract payments, accounts payable, vendor payments, direct deposits, portability billing, and related accounting processes.

4. Review daily, monthly, and periodic transaction reports for accuracy, completeness, and required follow-up.

5. Coordinate assigned accounting activities with other staff and assist with cross-training or coverage of related accounting desks.

6. Perform other duties as assigned.

**KNOWLEDGE AND ABILITIES:**

The Account Specialist classification requires the:

**Knowledge of:**

- Principles and practices of financial record keeping, fiscal control, and accounting support procedures.
- Accounting support methods involving accounts receivable, accounts payable, payroll, deposits, vendor payments, billing, reconciliations, and payment processing.
- Elementary and intermediate accounting principles and methods applicable to para-professional accounting support work.
- Housing Authority payment and billing processes, including HAP contract payments, portability billing, vendor payments, participant payments, and related financial transactions.
- Methods for reviewing, reconciling, and resolving complex account, payment, billing, and transaction discrepancies.
- Financial documentation requirements, including W-9 forms, 1099-related records, IRS records, ownership documentation, property records, HUD forms, HAP contracts and related supporting records.
- Accounting, housing, records management, spreadsheet, and related software systems used to process, review, reconcile, and correct financial transactions.
- Advanced spreadsheet functions and data review methods, including PivotTables, XLOOKUP, conditional formatting, formulas and functions, data validation, filtering and sorting large data sets, reconciling reports from multiple sources, identifying duplicate or missing records, and preparing summary reports used to identify unsupported payment amounts, discrepancies, and reporting issues.
- Customer service and communication methods for working with staff, vendors, landlords, participants, financial institutions, other housing authorities, and the general public.
- English grammar, punctuation, and business writing practices.

- Basic internal control concepts related to accuracy, documentation, segregation of duties, payment authorization, and record integrity.

**Ability to:**

- Perform advanced para-professional accounting support work accurately and independently.
- Analyze, reconcile, and resolve complex financial, payment, billing, and documentation discrepancies.
- Use independent judgment in carrying out instructions involving financial records, payment processing, billing, account reconciliation, and system corrections.
- Apply accounting codes, expenditure and revenue categories, funding streams, and transaction classifications accurately.
- Review and interpret financial, tax, ownership, vendor, housing, and payment-support documentation.
- Use accounting systems, housing systems, electronic records systems, spreadsheets, and related software to research transactions, maintain records, prepare reports, and identify errors.
- Use advanced spreadsheet tools, including PivotTables, XLOOKUP, conditional formatting, formulas and functions, data validation, filters, sorting, duplicate identification, and multi-source report comparison to organize data, identify missing records, verify payment amounts, reconcile accounts, and prepare reports.
- Communicate effectively both orally and in writing with internal staff and external contacts.
- Explain accounting procedures, documentation requirements, payment issues, and billing concerns clearly to non-accounting staff and external parties.
- Assist in training and provide technical assistance to other staff.
- Maintain accurate records and prepare financial, statistical, and reconciliation reports.
- Prioritize work, meet deadlines, handle confidential information, and maintain attention to detail.
- Successfully complete any required training courses and pass associated training examinations.
- Effectively interact with those contacted in the course of business and other staff.

**MINIMUM QUALIFICATIONS:**

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. Typical ways to obtain the knowledge and abilities would be:

1. Possession of an associate degree or higher from an accredited college or university with coursework in accounting, bookkeeping, business administration, finance, public administration, or a closely related field; AND Three years of increasingly responsible experience performing accounting support, accounts payable, accounts receivable, payroll, billing, payment processing, reconciliation, fiscal recordkeeping, or related

financial support duties, including at least one year performing complex reconciliation, payment review, billing review, or system-based accounting support work; OR

2. Four years of increasingly responsible experience performing accounting support, accounts payable, accounts receivable, payroll, billing, payment processing, reconciliation, fiscal recordkeeping, or related financial support duties, including at least one year performing complex reconciliation, payment review, billing review, or system-based accounting support work.

**QUALIFICATION REQUIREMENTS:**

To perform the duties of this classification successfully, an individual must be able to perform each essential job function satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability required for the Housing Technician. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential job functions. In addition, a driving record acceptable to the Housing Authority's insurance carrier must be maintained.

**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 the Account Specialist classification.

While performing the duties of this classification, mobility within the workplace is required. Manual dexterity is required to operate a computer. Good eyesight is required to read and write. Good hearing and speech are necessary in order to communicate with the general public, co-workers, agency clients, the general public and officials contacted in the normal course of work. Regular attendance is required. Employees in this classification must be able to handle stressful situations.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the Account Specialist classification.

While performing the duties of this classification, mobility within the workplace is required. Manual dexterity is required to operate a computer. Good eyesight is required to read and write. Good hearing and speech are necessary in order to communicate with the general public, co-workers, agency clients, the general public and officials contacted in the normal course of work. Regular attendance is required. Employees in this classification must be able to handle stressful situations.