

ORANGE COUNTY BOARD OF SUPERVISORS

A g e n d a R e v i s i o n s a n d S u p p l e m e n t a l s

Note: *This supplemental agenda is updated daily showing items that have been added, continued, deleted or modified. No new supplemental items will be added to the agenda following close of business on Friday immediately prior to a Board meeting.*

September 23, 2025

PRESENTATION (9:00 A.M.)

Revised Title to read:

Chair Chaffee and Vice Chair Foley will be presenting a resolution recognizing September 2025 as “Hunger Action Month”

CONSENT

9. Deleted

DISCUSSION

27. Deleted

28. Revised Title to read:

County Executive Office - Approve grant applications/awards submitted by Health Care Agency, OC Community Resources and Sheriff-Coroner and retroactive grant application/award submitted by Sheriff-Coroner in 9/23/25 grant report and other actions as recommended; and adopt resolution approving standard agreement CF-2223-22 Amendment 3 with California Department of Aging for Older American Act Programs, 10/1/25 – 9/30/26 (\$171,617); and authorize OC Community Resources Director or designee to execute amendment and related documents under certain conditions - All Districts

31. Revised Title to read:

County Executive Office - Approve FY 2025-26 September Budget Update report; approve related budget adjustments; approve addition and revision of events to FY 2025-26 County Event Calendar and make related findings under Government Code Section 26227; direct Auditor-Controller to close Special Assessment - Top of the World Improvement, Fund 431 and transfer residual balance to Miscellaneous, Budget Control 004; adopt resolution declaring a surplus in Drainage Improvement Program, Fund 150 (\$2,205,333) with unclaimed funds transferred to County General Fund, Miscellaneous, Budget Control 004 after two years; approve new and revised title codes, title descriptions, classification specifications and revised salary schedules and set or adjust pay grades and recruiting steps for various positions as summarized, effective 10/3/25; and approve and adopt Side Letter Agreements with Teamsters, Local 952, and Orange County Employees Association and Orange County Managers Association - All Districts (R.A.s 1 and 3 require 4/5 vote of the members present)

33. Continued to 10/14/25, 9:30 a.m.

THE FOLLOWING AGENDA ITEMS HAVE HAD CHANGES TO THEIR RECOMMENDED ACTIONS SINCE RELEASE OF THE AGENDA TO THE PUBLIC:

Items: 28 and 31

REVISIONS AND SUPPLEMENTALS TO SEPTEMBER 23, 2025 AGENDA - PAGE 1 OF 3

ORANGE COUNTY BOARD OF SUPERVISORS

A g e n d a R e v i s i o n s a n d S u p p l e m e n t a l s

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S u p p l e m e n t a l I t e m (s)

- S34A. **Supervisor Wagner** – Adopt resolution opposing Proposition 50 on November 2025 ballot
- S34B. **Internal Audit** - Approve contract CT-017-26010208 with Macias Gini & O'Connell LLP for independent risk assessment to update FY 2025-26 Audit Plan and incorporate audits of high-risk areas identified when developing FY 2026-27 Audit Plan, term ending 4/30/26 (\$129,500); and authorize County Procurement Officer or Deputized designee to execute contract – All Districts
- S34C. **Chair Chaffee** - Approve sponsorship of various nonprofit entities from Fourth District events funds; approve addition or revision of events to FY 2025-26 County Events Calendar; make related findings under Government Code Section 26227; and authorize Auditor-Controller to make related payments
- S34D. **Supervisor Sarmiento** - Approve sponsorship of various nonprofit entities from Second District events funds; approve addition or revision of events to FY 2025-26 County Events Calendar; make related findings under Government Code Section 26227; and authorize Auditor-Controller to make related payments
- S34E. **Chair Chaffee and Vice Chair Foley** – Take a support position on S. 1462 – Fix our Forests Act
- S34F. **Supervisor Sarmiento** - Approve allocation of \$25,000 from Second District discretionary funds for Orange County Gun Buy Back Program; make related findings under Government Code Section 26227; authorize County Executive Officer or designee to negotiate and enter into agreement as necessary; and authorize Auditor-Controller or designee to make related payments
- SCS1. **County Counsel** - CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION - SIGNIFICANT EXPOSURE TO LITIGATION – Pursuant to Government Code Section 54956.9(d)(2):
Number of Cases: Multiple
- SCS2. **County Counsel** - CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION - Pursuant to Government Code Section 54956.9(d)(1):
Name of Case: Jane Doe 1 v. County of Orange, Orange County Superior Court
Case No. 30-2024-01379816-CU-PO-NJC
- SCS3. **County Counsel** - CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION - Pursuant to Government Code Section 54956.9(d)(1):
Name of Case: Jennifer Kearns v. County of Orange, Orange County Superior Court Case No. 30-2021-01194060-CU-OE-WJC
- SCS4. **County Counsel** - CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION - Pursuant to Government Code Section 54956.9(d)(1):
Name of Case: Francis Kerrigan, et al. v. County of Orange, Orange County Superior Court Case No. 30-2018-00973047-CU-CR-CJC

ORANGE COUNTY BOARD OF SUPERVISORS

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- SCS5. **County Counsel** - CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION - Pursuant to Government Code Section 54956.9(d)(1):
Name of Case: Mind OC v. County of Orange, Orange County Superior Court Case No. 30-2024-01442012-CU-CO-CJC



BOARD OF SUPERVISORS

RECEIVED

MEMORANDUM

2025 SEP 17 PM 4:58

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

09/17/2025

To: Robin Stieler, Clerk of the Board

From: Chair Doug Chaffee, Fourth District
Vice Chair Katrina Foley, Fifth District

Doug Chaffee
Katrina Foley

Subject: Presentation Item for September 23, 2025, Board of Supervisors Meeting –
Revision to Hunger Action Month

Chair Doug Chaffee and Vice Chair Katrina Foley request a revision to the resolution language and title for Hunger Action Month. Revised title should read:

Chair Chaffee and Vice Chair Foley will be presenting a resolution recognizing September 2025 as "Hunger Action Month"

2025 Hunger Action Month

WHEREAS, hunger and poverty remain issues of vital concern in California, where more than one in five Californians face food insecurity on a daily basis and do not know where their next meal will come from; and

WHEREAS, everyone needs nutritious food to thrive, and people work hard to provide for themselves and their families—yet more than 359,000 individuals, including more than 86,000 children, here in Orange County are food insecure; and

WHEREAS, the County of Orange is committed to taking steps to combat hunger in every part of our community, including administering \$62 million in direct food assistance monthly through CalFresh – supporting 90,029 seniors and 229,391 children and adults as of 2024; and

WHEREAS, every dollar invested in these programs contributes to the economic vitality of Orange County, as \$1.79 in food assistance (per dollar) circulates back into the local economy and generates new economic activity; and

WHEREAS, the County of Orange is committed to working with the Orange County Hunger Alliance in educating people about the role and importance of food banks and food care in addressing hunger and raising awareness of the need to devote more resources and attention to hunger issues; and

WHEREAS, in the first half of 2025, Orange County Food Bank and Second Harvest Food Bank collectively recorded an average of 810,996 individual food distribution visits per month from our community members facing food insecurity; and

WHEREAS, in the first half of 2025, Orange County Food Bank, Second Harvest Food Bank, United Across Borders, ICNA Relief Southern California, Laguna Food Pantry, Share Ourselves, and South County Outreach have collectively distributed more than 40,000,000 pounds of food through its network of food pantries, soup kitchens, shelters, senior centers, schools, colleges, universities, houses of worship, and other community organizations; and

WHEREAS, Abound Food Care helps to facilitate the recovery of more than 25 million pounds of excess edible food in Orange county each year, reducing food waste and diverting that food to those who need it; and

WHEREAS, the month of September has been designated “Hunger Action Month,” bringing attention to food insecurity in our communities and enlisting the public in the movement to end hunger by taking action – including volunteering, donating, and advocating – to ensure every community, and everybody in it, has the food they need to thrive; and

WHEREAS, food banks and other organizations across the country, including the members of the Orange County Hunger Alliance, will host events throughout the month of September to bring awareness and help end food insecurity in our local community;

NOW, THEREFORE, BE IT RESOLVED, that the Orange County Board of Supervisors hereby recognizes September 2025 as Hunger Action Month in the County of Orange and call this observance to the attention of our residents.

2025 Hunger Action Month

WHEREAS, hunger and poverty ~~remain are~~ issues of vital concern in California, where more than one in five Californians face food insecurity on a daily basis and do not know where their next meal will come from; and

WHEREAS, everyone needs nutritious food to thrive, and people ~~work hard to provide are working hard to provide~~ for themselves and their families—yet ~~more than over~~ 359,000 individuals, including ~~more than over~~ 86,000 children, here in Orange County are food insecure; and

WHEREAS, the County of Orange is committed to taking steps to combat hunger in every part of our community, ~~including administering \$62 million in direct food assistance monthly through CalFresh – supporting 90,029 seniors and 229,391 children and adults as of 2024 and to provide additional resources that those in need~~; and

~~**WHEREAS**, every dollar invested in these programs contributes to the economic vitality of Orange County, as \$1.79 in food assistance (per dollar) circulates back into the local economy and generates new economic activity; and~~

WHEREAS, the County of Orange is committed to working with the Orange County Hunger Alliance in educating people about the role and importance of food banks and food care in addressing hunger and raising awareness of the need to devote more resources and attention to hunger issues; and

WHEREAS, in the first half of 2025, Orange County Food Bank and Second Harvest Food Bank collectively recorded an average of 810,996 individual food distribution visits per month from our community members facing food insecurity; and

WHEREAS, in the first half of 2025, Orange County Food Bank, ~~and~~ Second Harvest Food Bank, ~~United Across Borders, ICNA Relief Southern California, Laguna Food Pantry, Share Ourselves, and South County Outreach~~ have collectively distributed ~~36,709,298~~ 40,000,000 pounds of food through its ~~partner~~ network of food pantries, soup kitchens, shelters, senior centers, schools, colleges, universities, houses of worship, and other community organizations; and

WHEREAS, Abound Food Care helps to facilitate the recovery of ~~more than over~~ 25 million pounds of excess edible food in Orange county each year, reducing food waste and diverting that food to those who need it; and

WHEREAS, the month of September has been designated “Hunger Action Month” ~~in-order-to~~ ~~bring~~ing attention to food insecurity in our communities and to enlisting the public in the movement to end hunger by taking action – including volunteering, donating, and advocating – to ensure every community, and everybody in it, has the food they need to thrive; and

WHEREAS, food banks and other organizations across the country, including the members of the Orange County Hunger Alliance, will host events throughout the month of September to bring awareness and help end food insecurity in our local community;

NOW, THEREFORE, BE IT RESOLVED, that the Orange County Board of Supervisors ~~do~~ hereby recognizes September 2025 as Hunger Action Month in the County of Orange and call this observance to the attention of our residents.



Continuation or Deletion Request

Date: 9/18/2025
To: Clerk of the Board of Supervisors
From: Veronica Kelley, Agency Director, Health Care Agency
Re: ASR Control #: 24-000549, Meeting Date 9/23/2025 Agenda Item No. # 9
Subject: Approve Amendment No. 1 for Stakeholder Planning and Engagement Professional Services

☐ Request to continue Agenda Item No. # _____ to the _____ Board Meeting.

Comments:

☒ Request deletion of Agenda Item No. # 9

Comments:

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

2025 SEP 18 PM 12:05

RECEIVED



Continuation or Deletion Request

2025 SEP 23 AM 7:35

RECEIVED

Date: 9/22/2025
To: Clerk of the Board of Supervisors
From: Michelle Aguirre, County Executive Officer *MAguirre*
Re: ASR Control #: 24-001102, Meeting Date 9/23/2025 Agenda Item No. # 27
Subject: Legislative Issues

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS
Digitally signed by
Michelle Aguirre
Date: 2025.09.22
16:58:11 -07'00'

☐ Request to continue Agenda Item No. # _____ to the _____ Board Meeting.

Comments:

☒ Request deletion of Agenda Item No. # 27

Comments: Supervisor Wagner requested the item be deleted as it is "receive and file" only and does not have any action items for Board consideration



AGENDA STAFF REPORT

ASR Control 24-001078

MEETING DATE: 09/23/25
LEGAL ENTITY TAKING ACTION: Board of Supervisors
BOARD OF SUPERVISORS DISTRICT(S): All Districts
SUBMITTING AGENCY/DEPARTMENT: County Executive Office (Approved)
DEPARTMENT CONTACT PERSON(S): Peter DeMarco (714) 834-5777
 Andrea Foster (714) 834-2009

SUBJECT: Grant Applications/Awards Report

CEO CONCUR Concur	COUNTY COUNSEL REVIEW Approved Resolution to Form	CLERK OF THE BOARD Discussion 3 Votes Board Majority
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Budgeted: N/A	Current Year Cost: N/A	Annual Cost: N/A
Staffing Impact: No	# of Positions:	Sole Source: N/A
Current Fiscal Year Revenue: N/A	County Audit in last 3 years: No	
Funding Source: N/A		
Levine Act Review Completed: N/A		
Prior Board Action: N/A		

RECOMMENDED ACTION(S):

Approve grant applications/awards as proposed and other actions as recommended.

1. Receive and File Grants Report.
2. Approve Grant Award – Health Care Agency – Tobacco Use Prevention Program Proposition 99 and Proposition 56 California Tobacco Tax Funding Local Lead Agency 2022-2027 Comprehensive Tobacco Control Plan – \$1,370,424
3. Approve Grant Award – Health Care Agency – Black Infant Health - Agreement #202530 – \$951,410.06
4. Approve Grant Award – OC Community Resources – Medicare Improvements for Patients and Providers Act – \$213,083
5. Approve Grant Award – OC Community Resources – California Library Literacy Services (CLLS) / OC Read – \$102,504
6. Approve Grant Award and Adopt Resolution – OC Community Resources – CalFresh Outreach Program, Amendment 3 – \$171,617

7. Approve Grant Application – Sheriff-Coroner – BJA FY25 DNA Capacity Enhancement for Backlog Reduction (CEBR) - Formula Grants Program – \$480,000
8. Approve Retroactive Grant Application – Sheriff-Coroner - Edward Byrne Memorial Justice Assistance Grant (JAG) Equipment and Training Program – \$1,948,894
9. Approve Grant Award – Sheriff-Coroner – FY 25/26 Drug Prevalence in DUI Drivers – \$159,954

SUMMARY:

See the attached Grants Report.

BACKGROUND INFORMATION:

See the attached Grants Report.

FINANCIAL IMPACT:

N/A

STAFFING IMPACT:

N/A

ATTACHMENT(S):

Attachment A - Grants Report

Attachment B - Resolution OCCR CalFresh Outreach Program Amendment 3



Grants Report

DRAFT

County Executive Office/Legislative Affairs

September 23, 2025

Item No: 28

County of Orange Report on Grant Applications/Awards

The Grants Report is a condensed list of grant requests by County Agencies/Departments that allows the Board of Supervisors to discuss and approve grant submittals in one motion at a Board meeting. County policy dictates that the Board of Supervisors must approve all grant applications prior to submittal to the grantor. This applies to grants of all amounts, as well as to new grants and those that have been received by the County for many years as part of an ongoing grant. Receipt of grants \$50,000 or less is delegated to the County Executive Officer. Grant awards greater than \$50,000 must be presented to the Board of Supervisors for receipt of funds. This report allows for better tracking of county grant requests, the success rate of our grants, and monitoring of County's grants activities. It also serves to inform Orange County's Sacramento and Washington, D.C. advocates of County grant activities involving the State or Federal Governments.

On September 23, 2025, the Board of Supervisors will consider the following actions:

RECOMMENDED ACTIONS

Approve grant applications/awards as proposed and other actions as recommended.

ACTION ITEMS:

1. Receive and File Grants Report
2. Approve Grant Award – Health Care Agency – Tobacco Use Prevention Program
Proposition 99 and Proposition 56 California Tobacco Tax Funding Local Lead Agency
2022-2027 Comprehensive Tobacco Control Plan – \$1,370,424
3. Approve Grant Award – Health Care Agency – Black Infant Health - Agreement #202530 –
\$951,410.06
4. Approve Grant Award – OC Community Resources – Medicare Improvements for Patients
and Providers Act – \$213,083
5. Approve Grant Award – OC Community Resources – California Library Literacy Services
(CLLS) / OC Read – \$102,504
6. Approve Grant Award and Adopt Resolution – OC Community Resources – CalFresh
Outreach Program, Amendment 3 – \$171,617
7. Approve Grant Application – Sheriff-Coroner – BJA FY25 DNA Capacity Enhancement for
Backlog Reduction (CEBR) - Formula Grants Program – \$480,000
8. Approve Retroactive Grant Application – Sheriff-Coroner - Edward Byrne Memorial Justice
Assistance Grant (JAG) Equipment and Training Program – \$1,948,894

If you or your staff have any questions or require additional information on any of the items in this report, please contact Andrea Foster at (714) 834-2009.

9. Approve Grant Award – Sheriff-Coroner – FY 25/26 Drug Prevalence in DUI Drivers – \$159,954

If you or your staff have any questions or require additional information on any of the items in this report, please contact Andrea Foster at (714) 834-2009.



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 16, 2025
Requesting Agency/Department:	Health Care Agency
Grant Name and Project Title:	Tobacco Use Prevention Program Proposition 99 and Proposition 56 California Tobacco Tax Funding Local Lead Agency 2022-2027 Comprehensive Tobacco Control Plan
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	California Department of Public Health California Tobacco Control Program
Application Amount Requested:	\$1,370,424
Application Due Date:	N/A
Board Date when Board Approved this Application:	July 23, 2024
Awarded Funding Amount:	\$1,370,424
Notification Date of Funding Awarded:	September 4, 2025
Is this an Authorized Retroactive Grant Application/Award? No	
Recurrence of Grant:	Yes
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	FY21-22 \$678,679 FY22-23 \$1,180,952 FY23-24 \$1,214,339 FY24-25 \$781,113
Does this grant require CEQA findings?	No
What Type of Grant is this?	Award - Allocation
County Match?	No
How will the County Match be fulfilled? (Please include the specific budget)	N/A
Will the grant/program create new part or full-time positions?	No
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.
The purpose of this Grant is to provide comprehensive tobacco control programs in a coordinated effort to implement population-level interventions to diminish appeal and acceptability of tobacco use, increase tobacco use cessation, reduce secondhand smoke exposure, and prevent initiation of tobacco use among young people. As the Local Lead Agency (LLA) for Orange County, per the requirements under Proposition 99/56 (State tobacco tax) funding, the Orange County Health Care Agency Tobacco Use Prevention Program is responsible for implementing a local plan that encompasses comprehensive community interventions against tobacco use.	

According to the CDPH notice, Proposition 99/56 allocation is projected to be:

\$781,128 for FY 2025/26

\$589,296 for FY 2026/27

Board Resolution Required?

No

Deputy County Counsel Name:

Recommended Action(s)

(Please specify below)

The HCA respectfully requests that the Board takes the following action:

1. Accept the **LLA Allocation Agreement for Proposition 99 and Proposition 56 Funds** for the period of July 1, 2025, through June 30, 2026 in the amount of **\$781,128.00**.
2. Accept the **LLA Allocation Agreement for Proposition 99 and Proposition 56 Funds** for the period of July 1, 2026, through June 30, 2027 in the amount of **\$589,296.00**.
3. Authorize the Health Care Agency Director, or designee, to sign and execute the Acceptance of Allocation Agreement and/or any documents related to this award, and to make such future amendments thereto that do not change the Agreement amount by no more than 10% of the original amount and/or make immaterial, ministerial changes to the Agreement.

Department Contact:

List the name and contact information (telephone, email) of the person to be contacted for further information.

Jenna Sarin 714-834-4099 jsarin@ochca.com

Name of individual attending the Board Meeting:

List the name of the individual who will be attending the Board Meeting for this Grant item:

Veronica Kelley



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 16, 2025
Requesting Agency/Department:	Health Care Agency
Grant Name and Project Title:	Black Infant Health – Agreement #202530
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	California Department of Public Health: Maternal, Child, and Adolescent Health Division
Application Amount Requested:	\$951,410.06
Application Due Date:	N/A
Board Date when Board Approved this Application:	August 12, 2025
Awarded Funding Amount:	\$951,410.06
Notification Date of Funding Awarded:	September 11, 2025
Is this an Authorized Retroactive Grant Application/Award? No	
Recurrence of Grant:	Yes
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	FY 24-25 Awarded: \$1,048,577.61 FY 23-24 Awarded: \$961,605.18
Does this grant require CEQA findings?	No
What Type of Grant is this?	Award - Allocation
County Match?	No
How will the County Match be fulfilled? (Please include the specific budget)	N/A
Will the grant/program create new part or full-time positions?	No
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.
The California Department of Public Health (CDPH) Maternal, Child and Adolescent Health (MCAH) Division receives funding from the state budget and from the federal government to disburse to local health-related entities and others to promote better health of all mothers and children in California. The Black Infant Health (BIH) Program is a program under the MCAH Branch and is operational in Orange County within HCA's Public Health Services Community and Nursing Services Division (CNSD). Goals of the BIH program are to ensure women are healthy before, during and after pregnancy, ensure all infants are born healthy and thrive in their first year of life, and reduce infant mortality with a focus on reducing disparities.	

Board Resolution Required?	No
Deputy County Counsel Name:	
Recommended Action(s) (Please specify below)	
The Health Care Agency requests that the Board of Supervisors: 1. Accept the grant funding award from the California Department of Public Health Maternal, Child, and Adolescent Health Division for the Black Infant Health Program for the term of July 1, 2025, through June 30, 2026, in the amount of \$951,410.06. 2. Authorize the Health Care Agency Director, or designee, to execute the Grant Award Agreement, upon review and approval by County Counsel, and delegate authority to the Health Care Agency Director, or designee, to sign and execute the Acceptance of Award, Agreement and/or any documents related to this award, and to make such future amendments thereto that do not change the Agreement amount by more than 10% of the original amount and/or make immaterial, ministerial changes to the Agreement.	
Department Contact:	List the name and contact information (telephone, email) of the person to be contacted for further information.
Jennifer Sarin 714-834-4099 JSarin@ochca.com	
Name of individual attending the Board Meeting:	List the name of the individual who will be attending the Board Meeting for this Grant item:
Veronica Kelley	



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 16, 2025
Requesting Agency/Department:	OC Community Resources
Grant Name and Project Title:	Medicare Improvements for Patients and Providers Act
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	California Department of Aging
Application Amount Requested:	N/A
Application Due Date:	N/A
Board Date when Board Approved this Application:	N/A
Awarded Funding Amount:	\$213,083
Notification Date of Funding Awarded:	August 29, 2025
Is this an Authorized Retroactive Grant Application/Award? No	
Recurrence of Grant:	Yes
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	FY 2024-25: \$287,340 FY 2023-24: \$206,202 FY 2022-23: \$239,890 FY 2021-22: \$282,432 FY 2020-21: \$169,406
Does this grant require CEQA findings?	No
What Type of Grant is this?	Award - Non Competitive
County Match?	No
How will the County Match be fulfilled? (Please include the specific budget)	N/A
Will the grant/program create new part or full-time positions?	No
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.

Medicare Improvements for Patients and Providers Act (MIPPA) funds are used to support the Health Insurance Counseling & Advocacy Program (HICAP), which provides free, confidential, non-bias counseling and community education about Medicare, private health insurance and related health care coverage plans for Medicare beneficiaries, their representatives and people who will soon be eligible for Medicare. The MIPPA funds augment HICAP services by expanding low-income Medicare beneficiary awareness of and enrollment in programs that may save them money on Medicare costs including the Prescription Drug Low-Income Subsidy Program/Extra Help and Medicare Savings Programs. Funds also support ongoing counselor training, collaboration with new and existing partners, and targeted outreach including mass media campaigns in the County threshold

languages.

On August 29, 2025, California Department of Aging (CDA) notified OC Community Resources/Office on Aging of the MIPPA actual annual funding allocations effective September 1, 2025 – August 31, 2026, to provide the MIPPA required services and activities.

On June 4, 2024, under Agenda Staff Report 24-000326, the Orange County Board of Supervisors (Board) approved the Memorandum of Understanding AAA-2425-22 (MOU) with CDA and Older Americans Act and Older Californians Act Program Guide dated April 10, 2024 (Program Guide) to allow for the CDA to directly allocate funding to the Orange County Office of Aging (OoA) without the need to execute annual contracts or amendments. The MOU describes the OoA's obligations to perform work and services according to the requirements of the MOU and the Program Guide. If the grant award described herein is accepted, the grant, and the County's performance of its obligations in connection with the grant, would be subject to the terms of the MOU and Program Guide that were approved by the Board in June 2024.

Board Resolution Required?	No
Deputy County Counsel Name:	
Recommended Action(s) (Please specify below)	
Accept the Medicare Improvements for Patients and Providers Act FY 2025-26 grant award funding of \$213,083.	
Department Contact:	List the name and contact information (telephone, email) of the person to be contacted for further information.
Dylan Wright (714) 480-2788 Dylan.Wright@occr.ocgov.com Renee Ramirez (714) 480-6483 Renee.Ramirez@occr.ocgov.com	
Name of individual attending the Board Meeting:	List the name of the individual who will be attending the Board Meeting for this Grant item:
Dylan Wright	



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 16, 2025
Requesting Agency/Department:	OC Community Resources
Grant Name and Project Title:	California Library Literacy Services (CLLS) / OC Read
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	California State Library
Application Amount Requested:	N/A
Application Due Date:	May 29, 2025
Board Date when Board Approved this Application:	June 24, 2024
Awarded Funding Amount:	\$102,504
Notification Date of Funding Awarded:	September 9, 2025
Is this an Authorized Retroactive Grant Application/Award? No	
Recurrence of Grant:	Yes
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	FY 2024-25: \$113,894 FY 2023-24: \$126,549 FY 2022-23: \$126,728 FY 2021-22: \$140,809 FY 2020-21 \$145,621
Does this grant require CEQA findings?	No
What Type of Grant is this?	Award - Competitive
County Match?	No
How will the County Match be fulfilled? (Please include the specific budget)	N/A
Will the grant/program create new part or full-time positions?	No
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.
OC Read provides tutoring in basic reading and writing to adult learners throughout Orange County and is available at all OC Community Resources/OC Public Libraries (OCCR/OCPL) branch locations. Lessons are individualized and goal oriented. Tutors structure the learning process around the goals established by the learner, using materials and library programs to achieve those goals. For program participants with children, the OC Read Families for Literacy program helps support the family unit and promotes a culture of literacy. The program helps adults develop confidence and skills in supporting their children's literacy and educational endeavors.	

On September 9, 2025, OCCR/OCPL received notification from the California State Library - California Library Literacy Services of a projected grant award in the amount of \$102,504.

Grant funding will facilitate program opportunities and services that foster positive learning experiences for parents and/or caregivers and will be used to offset staff salaries and benefits, literacy materials and supplies.

Board Resolution Required?	No
Deputy County Counsel Name:	
Recommended Action(s) (Please specify below)	
1. Authorize the OC Community Resources Director or designee to accept the grant funds awarded in the amount of \$102,504 for literacy services for FY 2025-26 2. Authorize the OC Community Resources Director, or designee, to execute any related documents necessary to accept the grant award funding.	
Department Contact:	List the name and contact information (telephone, email) of the person to be contacted for further information.
Dylan Wright (714) 480-2788 Dylan.Wright@occr.ocgov.com Julie Quillman (714) 566-3086 Julie.Quillman@occr.ocgov.com	
Name of individual attending the Board Meeting:	List the name of the individual who will be attending the Board Meeting for this Grant item:
Dylan Wright	



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 16, 2025
Requesting Agency/Department:	OC Community Resources
Grant Name and Project Title:	CalFresh Outreach Program, Amendment 3
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	California Department of Aging (CDA)
Application Amount Requested:	N/A
Application Due Date:	N/A
Board Date when Board Approved this Application:	N/A
Awarded Funding Amount:	\$171,617
Notification Date of Funding Awarded:	August 27, 2025
Is this an Authorized Retroactive Grant Application/Award? No	
Recurrence of Grant:	Yes
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	Federal Fiscal Year (FFY) 2022-25 Amendment 2: \$107,936 FFY 2022-25 Amendment 1: \$703,980 FFY 2022-25: \$1,027,806
Does this grant require CEQA findings?	No
What Type of Grant is this?	Award - Non Competitive
County Match?	No
How will the County Match be fulfilled? (Please include the specific budget)	N/A
Will the grant/program create new part or full-time positions?	No
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.
The CalFresh Outreach Program seeks to inform older adults aged 60 years and older that they may be eligible for CalFresh benefits through pre-screening, application assistance and outreach activities. CalFresh Outreach funding is awarded by the California Department of Aging (CDA) to OC Community Resources/Office on Aging (OCCR/OoA) via State Standard Agreement (SSA) No. CF-2223-22. The Agreement term is based on the Federal Fiscal Year (FFY) of October 1 through September 30. Funding for the FFY 2025-26 will continue to support the state mandated requirements of the program. On August 27, 2025, OCCR/OoA was notified by CDA that SSA No. CF-2223-22 would be extended for one year through September 30, 2026, and includes the annual CalFresh Outreach funding allocation in the amount of \$171,617. SSA No. CF-2223-22, Amendment 3 increases the CalFresh Outreach portion of the funding by	

\$171,617 for FFY 2025-26, for a new maximum agreement amount of \$2,011,339.

The funds will be used for pre-screening, application assistance and outreach activities by the current service provider, Orange County United Way. Outreach is conducted through the Orange County United Way call center, where CalFresh benefits information is provided in multiple languages, including all County threshold languages, through translation services. Callers are appropriately screened and assisted in the application process if found eligible.

Board Resolution Required?	Yes
Deputy County Counsel Name:	John Cleveland
Recommended Action(s) (Please specify below)	
1. Adopt the resolution as approved by the Office of the County Counsel to receive \$171,617 in funds from the California Department of Aging for CalFresh Outreach Program. 2. Approve the State Standard Agreement CF-2223-22, Amendment 3 with the California Department of Aging in the amount of \$171,617 for the term October 1, 2025, through September 30, 2026, for a new cumulative contract amount of \$2,011,339. 3. Authorize the OC Community Resources Director or designee to execute the State Standard Agreement CF-2223-22, Amendment 3 to receive \$171,617 in additional funding from the California Department of Aging. 4. Authorize the OC Community Resources Director or designee to execute all documents required to accept additional CalFresh Outreach Program grant award funding.	
Department Contact:	List the name and contact information (telephone, email) of the person to be contacted for further information.
Dylan Wright (714) 480-2788 Dylan.Wright@occr.ocgov.com Renee Ramirez (714) 480-6483 Renee.Ramirez@occr.ocgov.com	
Name of individual attending the Board Meeting:	List the name of the individual who will be attending the Board Meeting for this Grant item:
Dylan Wright	

RESOLUTION OF THE BOARD OF SUPERVISORS OF
ORANGE COUNTY, CALIFORNIA
September 23, 2025

WHEREAS, OC Community Resources Office on Aging has received State Standard Agreement CF-2223-22, Amendment 3 in the amount of \$171,617 from the California Department of Aging containing funding allocations for Older Americans Act Programs; and

WHEREAS, the County of Orange assures that it will abide by the terms and conditions of Agreement CF-2223-22, Amendment 3; and

WHEREAS, this Board agrees with the terms of the State Standard Agreement and the allocation of funds contained therein.

NOW, THEREFORE, BE IT RESOLVED that this Board does hereby:

1. Approve the State Standard Agreement CF-2223-22, Amendment 3 with the California Department of Aging in the amount of \$171,617 for the term October 1, 2025, through September 30, 2026, for a new cumulative contract amount of \$2,011,339.
2. Authorize the OC Community Resources Director or designee to execute the State Standard Agreement CF-2223-22, Amendment 3 to receive \$171,617 in additional funding from the California Department of Aging.
3. Authorize the OC Community Resources Director or designee to execute all documents required to accept the additional CalFresh Outreach Program grant award funding.

Resolution No. , Item No.
State Standard Agreement CF-2223-22, Amendment 3



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 16, 2025												
Requesting Agency/Department:	Sheriff-Coroner												
Grant Name and Project Title:	BJA FY25 DNA Capacity Enhancement for Backlog Reduction (CEBR) - Formula Grants Program												
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	U.S. Department of Justice, the Office of Justice Programs (OJP) Bureau of Justice Assistance (BJA)												
Application Amount Requested:	\$480,000												
Application Due Date:	October 29, 2025												
Board Date when Board Approved this Application:	N/A												
Awarded Funding Amount:	N/A												
Notification Date of Funding Awarded:	N/A												
Is this an Authorized Retroactive Grant Application/Award? No													
Recurrence of Grant:	Yes												
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	<table border="1" style="margin: auto; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>Year</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>2024</td> <td>\$562,538</td> </tr> <tr> <td>2023</td> <td>\$488,916</td> </tr> <tr> <td>2022</td> <td>\$470,810</td> </tr> <tr> <td>2021</td> <td>\$429,769</td> </tr> <tr> <td>2020</td> <td>\$405,643</td> </tr> </tbody> </table>	Year	Amount	2024	\$562,538	2023	\$488,916	2022	\$470,810	2021	\$429,769	2020	\$405,643
Year	Amount												
2024	\$562,538												
2023	\$488,916												
2022	\$470,810												
2021	\$429,769												
2020	\$405,643												
Does this grant require CEQA findings?	No												
What Type of Grant is this?	Application - Formula Grant Program												
County Match?	No												
How will the County Match be fulfilled? (Please include the specific budget)	N/A												
Will the grant/program create new part or full-time positions?	No												
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.												

The DNA Capacity Enhancement for Backlog Reduction (CEBR) Grant Program is designed to reduce backlogs and improve the quality and timeliness of forensic science and medical examiner services. The Orange County Crime Lab will use the funding from the grant to purchase new analytical instruments that will help process DNA samples that have been awaiting review. The grant will also fund overtime for existing personnel to assist in handling the backlog of DNA casework.

Board Resolution Required?	No
Deputy County Counsel Name:	
Recommended Action(s) (Please specify below)	
Authorize the Sheriff-Coroner, or designee, to sign all necessary application documents required for the submission of the application and supporting documentation to the U.S. Department of Justice, Office of Justice Programs, Bureau of Justice Assistance.	
Department Contact:	List the name and contact information (telephone, email) of the person to be contacted for further information.
Director Stephanie Callian (714) 834-4510 scallian@ocsheriff.gov	
Name of individual attending the Board Meeting:	List the name of the individual who will be attending the Board Meeting for this Grant item:
Director Stephanie Callian	

ORANGE COUNTY SHERIFF'S DEPARTMENT

INTERNAL MEMO

To: County Executive Officer, Michelle Aguirre

From: Sheriff-Coroner, Don Barnes

Date: September 16, 2025

RE: Retroactive Request to Apply for the Edward Byrne Memorial Justice Assistance Grant (JAG) Equipment and Training Program

Digitally signed by
Michelle Aguirre
Date: 2025.09.16
15:05:23 -07'00'



The Sheriff-Coroner Department requests that the County Executive Officer place the subject grant application on the agenda for the September 23, 2025, Board of Supervisors Meeting. The Sheriff also requests retroactive approval to apply for the Edward Byrne Memorial Justice Assistance Grant (JAG) Equipment and Training Program. The Sheriff-Coroner was unable to request permission to apply for this grant before the deadline of September 8, 2025, due to insufficient time to gather the necessary collaborative information.

The grant program will involve collaboration between the Orange County Sheriff's Department (OCSD), the Orange County District Attorney's (OCDA) Office, and the Probation Department. The program aims to enhance mental health crisis interventions, prevent school violence, implement co-responder initiatives, and prosecute violent crimes. The OCSD will lead the grant program and use the funding to provide training for law enforcement officers. This training will focus on enhancing their skills in crisis de-escalation and developing effective strategies for assisting individuals with mental health issues. The OCDA will purchase a mobile command vehicle to support operations in high-crime areas and provide training to keep prosecutors informed about various legal and practical issues. The Probation Department will utilize the funding for training, establish a canine program designed to assist in crisis de-escalation, and enhance the wellness and resilience of staff personnel. This initiative will include the creation of wellness spaces and the upgrading of fitness with gym equipment to improve staff effectiveness, resilience, and overall community safety.

If you have any questions about this grant, please contact Miriam Torrez, Fiscal Administrator, at (714) 834-4347 or mtorrez@ocsheriff.gov.

c: Executive Manager Brian Wayt, Administrative Services Command
Business Services Deputy Director Noma M. Crook, Financial/Administrative Services Division
Senior Fiscal Manager Karla Lazaridis, Financial/Administrative Services Division
Fiscal Administrator Miriam Torrez, Financial/Administrative Services Division



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 16, 2025
Requesting Agency/Department:	Sheriff-Coroner
Grant Name and Project Title:	Edward Byrne Memorial Justice Assistance Grant (JAG) Equipment and Training Program
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	California Board of State and Community Corrections (BSCC) passed-through the Bureau of Justice Assistance (BJA)
Application Amount Requested:	\$1,948,894
Application Due Date:	September 8, 2025
Board Date when Board Approved this Application:	N/A
Awarded Funding Amount:	N/A
Notification Date of Funding Awarded:	N/A
Is this an Authorized Retroactive Grant Application/Award? Retroactive	
Recurrence of Grant:	No
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	N/A
Does this grant require CEQA findings?	No
What Type of Grant is this?	Application - Non Competitive
County Match?	No
How will the County Match be fulfilled? (Please include the specific budget)	N/A
Will the grant/program create new part or full-time positions?	No
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.

The Edward Byrne Memorial Justice Assistance Grant (JAG) Program aims to enhance mental health crisis interventions, prevent school violence, implement co-responding initiatives, and prosecute violent crimes. This program will involve collaboration among the Orange County Sheriff's Department (OCSD), the Orange County District Attorney's (OCDA) Office, and the Probation Department. OCSD will act as the lead agency, ensuring the successful implementation of the grant program.

OCSD will utilize the grant funding to provide training to help law enforcement officers enhance their crisis de-escalation skills and develop more effective strategies for assisting individuals with mental health issues. The funding will also support training for School Resource Officers to educate, counsel, and protect school communities. The OCDA will purchase a mobile command vehicle to support operations in high-crime areas and

provide training to keep prosecutors informed about various legal and practical issues.

The Probation Department will implement training focused on crisis intervention, de-escalation techniques, and trauma-informed responses. They will also implement a canine program designed to assist in crisis de-escalation and enhance the wellness and resilience of staff personnel. This initiative will include the creation of wellness spaces and the upgrading of fitness with gym equipment to improve staff effectiveness, resilience, and overall community safety.

Board Resolution Required?	No
Deputy County Counsel Name:	
Recommended Action(s) (Please specify below)	
Authorize the Sheriff-Coroner, or designee, to retroactively apply for the Edward Byrne Memorial Justice Assistance Grant (JAG) Equipment and Training Program.	
Department Contact:	List the name and contact information (telephone, email) of the person to be contacted for further information.
Commander Virgil Asuncion (949) 425-1818 vdasuncion@ocsheriff.gov	
Name of individual attending the Board Meeting:	List the name of the individual who will be attending the Board Meeting for this Grant item:
Commander Virgil Asuncion	



CEO-Legislative Affairs Office Grant Authorization eForm

GRANT APPLICATION / GRANT AWARD

Today's Date:	September 17, 2025													
Requesting Agency/Department:	Sheriff-Coroner													
Grant Name and Project Title:	FY 25/26 Drug Prevalence in DUI Drivers													
Sponsoring Organization/ Grant Source: (If the grant source is not a government entity, please provide a brief description of the organization/foundation)	State of California Office of Traffic Safety (OTS)													
Application Amount Requested:	\$160,000													
Application Due Date:	January 31, 2025													
Board Date when Board Approved this Application:	January 28, 2025													
Awarded Funding Amount:	\$159,954													
Notification Date of Funding Awarded:	September 9, 2025													
Is this an Authorized Retroactive Grant Application/Award? No														
Recurrence of Grant:	Yes													
If this is a recurring grant, please list the funding amount applied for and awarded in the past:	<table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="padding: 5px;">Grant Term</th> <th style="padding: 5px;">Amount</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">2024/25</td> <td style="padding: 5px;">\$154,743</td> </tr> <tr> <td style="padding: 5px;">2023/24</td> <td style="padding: 5px;">\$141,940</td> </tr> <tr> <td style="padding: 5px;">2022/23</td> <td style="padding: 5px;">\$164,700</td> </tr> <tr> <td style="padding: 5px;">2021/22</td> <td style="padding: 5px;">\$299,850</td> </tr> <tr> <td style="padding: 5px;">2020/21</td> <td style="padding: 5px;">\$117,000</td> </tr> </tbody> </table>		Grant Term	Amount	2024/25	\$154,743	2023/24	\$141,940	2022/23	\$164,700	2021/22	\$299,850	2020/21	\$117,000
Grant Term	Amount													
2024/25	\$154,743													
2023/24	\$141,940													
2022/23	\$164,700													
2021/22	\$299,850													
2020/21	\$117,000													
Does this grant require CEQA findings?	No													
What Type of Grant is this?	Award - Competitive													
County Match?	No													
How will the County Match be fulfilled? (Please include the specific budget)	N/A													
Will the grant/program create new part or full-time positions?	No													
Purpose of Grant Funds:	Provide summary and brief background on why the Board of Supervisors should accept this grant application/award, and how the grant will be implemented.													

Funding through the California Office of Traffic Safety (OTS) program will assist with continuous testing of all blood samples collected from individuals arrested for driving under the influence (DUI) for the presence of drugs,

regardless of the tested blood alcohol concentration (BAC). The grant will also support the improvement of data collection services by funding further analytic training and overtime for current staff.

Board Resolution Required?

No

Deputy County Counsel Name:**Recommended Action(s)**

(Please specify below)

1. Authorize the Sheriff-Corner, or designee, to accept the award from the California Office of Traffic Safety for the Drug Prevalence in DUI Drivers grant.
2. Authorize the Sheriff-Coroner or designee to execute the FY25/26 Grant Agreement, any subsequent amendments, and related documents that do not materially alter the terms of the grant award.

Department Contact:

List the name and contact information (telephone, email) of the person to be contacted for further information.

Director Stephanie Callian (714) 834-6380 scallian@ocsheriff.gov
 Senior Manager Erin Nixt (714) 834-4510 enixt@ocsheriff.gov

Name of individual attending the Board Meeting:

List the name of the individual who will be attending the Board Meeting for this Grant item:

Director Stephanie Callian / Senior Manager Erin Nixt



Revision to ASR and/or Attachments

RECEIVED

2025 SEP 19 AM 9:41

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

Date: September 17, 2025
To: Clerk of the Board of Supervisors
CC: County Executive Office
From: Michelle Aguirre, County Executive Officer
Re: ASR Control #: 25-000642, Meeting Date 09/23/25, Item No. # 31
Subject: FY 2025-26 September Budget Update

Digitally signed
by Michelle
Aguirre
Date: 2025.09.19
09:22:20 -07'00'

M. Aguirre

Explanation: County Budget and Finance Office requests the following:

1. Replacement of placeholder with the full Attachment A – FY 2025-26 September Budget Update.
2. Replacement of placeholder with the full Attachment H – Classification Maintenance Studies.
3. Replacement of placeholder with the full Attachment I – Teamsters Side Letter Agreement.
4. Replacement of placeholder with the full Attachment J – OCEA Side Letter Agreement.
5. Add Attachment K – OCMA Side Letter Agreement.
6. Revise language in Recommended Actions #4, 6 and 10.
7. Delete Recommended Action #11.
8. Add Recommended Actions #13.

☒ Revised Recommended Action(s)

4. Adopt resolution declaring a surplus in Drainage Improvement Program, Fund 150, in the amount of \$2,205,333 and that any portion of the funds which remain unclaimed ~~within~~ after two years from the date of adoption of the resolution shall be transferred to the County General Fund, Miscellaneous, Budget Control 004.
6. Effective October 3, 2025, approve revised classification specifications and adjust pay grades and recruiting steps for Fleet Technician I (Title Code 33000S), Fleet

Technician II (Title Code 3301OS), Fleet Technician III (Title Code 3302OS), and Supervising Fleet Technician (Title Code 3303SM).

10. Effective October 3, 2025, approve revised classification specifications for Public Information and Affairs Analyst (Title Code 8277MA), Public Information and Affairs Administrator (Title Code 8278MA), Public Information and Affairs Manager (Title Code 8279MA), and Public Information and Affairs Manager, Senior (Title Code 8280MA); **Public Information and Affairs Assistant Deputy Director (Title Code 8281MA); and approve revised classification specification and adjust pay grade for Public Information and Affairs Assistant Deputy Director (Title Code 8281MA); and approve new title code, title description, classification specification, and set pay grade for Public Information and Affairs Deputy Director (Title Code 8287MA).**
- ~~11. Effective October 3, 2025, approve revised title description and classification specification for Associate Medical Director (Title Code 8261MA).~~
13. Effective October 3, 2025, approve and adopt Side Letter Agreement between the County of Orange and Orange County Managers Association (OCMA), that will allow employees holding the title of Medical Services Manager, Medical Services Manager, Senior, and Medical Services Assistant Medical Director to maintain their current title until they vacate their current position, included as Attachment K.

☐ Make modifications to the:

☐ Subject ☐ Background Information ☐ Summary ☐ Financial Impact

☒ Revised Attachments (attach revised attachment(s) and redlined copy(s))

Replace Attachment A – FY 2025-26 September Budget Update
Replace Attachment H – Classification Maintenance Studies
Replace Attachment I – Teamsters Side Letter Agreement
Replace Attachment J – OCEA Side Letter Agreement
Add Attachment K – OCMA Side Letter Agreement



FY 2025-26 September Budget Update

Acknowledgement:

Cover art courtesy of CEO Communications

FY 2025-26 SEPTEMBER BUDGET UPDATE

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Obligated Fund Balance Adjustments Summary	5



BUDGET ISSUES

Fund Balance Unassigned (FBU) and Technical Adjustments

Fund Balance Unassigned Technical Adjustments:

Each year, the Board adopts a final budget prior to the June 30 fiscal year end and before final fund balances are known in the following August. During budget development, departments balance the budgets using estimated obligated fund balances.

As part of the FY 2024-25 year-end closing process, General Fund final balances were calculated and resulted in \$50.8 million of Fund Balance Unassigned. In accordance with Board Resolution 10-136, dated June 29, 2010, Auditor-Controller recorded an entry in August 2025 to transfer the excess of \$50.8 million from Fund Balance Unassigned (FBU) to Fund Balance Assigned, Balance Sheet Code 9740. The recommended allocation of the assigned fund balance is located on page 2 of this report.

Adjustments are required for Non-General Funds that ended FY 2024-25 with insufficient final Obligated Fund Balance (OFB) to finance the adopted budget requirements; and for all Internal Service Funds and Enterprise Funds with final fund balances varying from the estimated fund balances in the adopted budget. In most cases, the appropriations adjustments are decreases reflecting actual available financing, while appropriations adjustments for actual fund balances higher than estimated are increases reflecting the additional available financing. These adjustments are in the *Recommended Actions* section in a separate summary schedule, "*Fund Balance Available Adjustments*."

Other Issues

County Executive Office (Department 017)

Special Assessment – Top of the World Improvement Fund Closure

Direct Auditor-Controller to close the Special Assessment – Top of the World Improvement, Fund 431, and transfer any residual balances, estimated to be less than \$100, to Miscellaneous, Budget Control 004, due to completion of improvement activities within special assessment district.

OC Public Works (Department 080)

Drainage Improvement Program Surplus

In Drainage Improvement Program, Fund 150, declare a surplus in the amount of \$2,205,333 from residual per-acre drainage fees paid by developers for necessary drainage improvements as approved by the Board of Supervisors on October 8, 1968 via

County of Orange
FY 2025-26 September Budget Update
September 23, 2025

Resolution No. F68-92, Comprehensive Plan for Local Storm Draining Financing. The planned drainage facilities have now been constructed, and due to the passage of time and insufficient identifying information, it is no longer possible to locate or verify the developers who might otherwise be entitled to refunds. Any portion of the surplus funds which remain unclaimed after two years from the date of Board of Supervisors approval, shall be transferred to the County General Fund, Miscellaneous, Budget Control 004, per Government Code section 66483.2.

Fund Balance Assignments

- The following is recommended assignment of excess fund balance recorded in Balance Sheet Account 9740 as a result of the FY 2024-25 year-end closing process:

	Amount Committed
Budget Stabilization Reserve Target (9745)	38,025,850
Fund Balance – Assigned for Contingencies (9741)	12,819,734
Total Fund Balance Commitments	\$ 50,845,584

Recommended Actions

A four-fifths vote is required on Recommended Actions One and Three. The requested appropriation, revenue, transfers in/out and reserve changes are summarized in this section of the report in the *Obligated Fund Balance/Net Position Adjustments Summary* documents.

1. Direct the Auditor-Controller to revise appropriations, revenues, transfers in/out and reserves as detailed in the *Obligated Fund Balance/Net Position Adjustments Summary*, included in the Recommended Actions section of the report, for final fund balancing in accordance with Government Code Sections 29130 and 25252. **(Requires four-fifths vote)**
2. Approve the addition or revision of events to the FY 2025-26 Master Events Calendar, as set forth in Attachment C, and per Government Code Section 26227, find that the events therein will serve a public purpose of the County of Orange and will meet the social needs of the population of the County including, but not limited to, the areas of health, law enforcement, public safety, rehabilitation, welfare, education, legal services and the needs of physically, mentally and financially handicapped persons and aged persons; that County staff and resources may be used in furtherance of such events; and that County staff may solicit donations of funds and services for such events.
3. Direct Auditor-Controller to close Special Assessment – Top of the World Improvement, Fund 431, and transfer any residual balance to Miscellaneous, Budget Control 004. **(Requires four-fifths vote)**
4. Adopt resolution declaring a surplus in Drainage Improvement Program, Fund 150, in the amount of \$2,205,333 and that any portion of the funds which remain unclaimed after two years from the date of adoption of the resolution shall be transferred to the County General Fund, Miscellaneous, Budget Control 004.

Note: Recommended Actions five through thirteen are related to position maintenance studies, please see Attachment H.



**Obligated Fund Balance/Net Position Adjustment Summary
(For Fiscal Year Ended June 30, 2025)**

Budget Control Name	Fund	Dept Code	Budget Control	Budget Unit	Rev Source	Object	Balance Sheet Acct	Dept Rev Code	Dept Obj Code	Dept BalSht Code	Appropriations	Revenue	Inc/Dec Reserves	Net County Cost
P1 - Public Protection														
District Attorney - Public Administrator	100	026	026	026-2000	7811			T14H				(157,673)	0	157,673
District Attorney - Public Administrator	100	026	026	026-2000		1900			0000		(157,673)	0	0	(157,673)
District Attorney's Supp Law Enforcement Svcs	14H	026	14H	14H-2000		4800			T026		(157,673)	0	0	(157,673)
SB 823 Department of Juvenile Justice Realignment	12Y	057	12Y	12Y-8000		5000			0000		2,145,947	0	0	2,145,947
Orange County Jail Fund	134	060	134	134-7471		5000			0000		(3)	0	0	(3)
Sheriff's Supplemental Law Enforcement Services	14G	060	14G	14G-9493		5000			0000		(1,989,770)	0	0	(1,989,770)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P541	6920			0000			0	(5,000,000)	0	5,000,000
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P543	6920			0000			0	(4,000,000)	0	4,000,000
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P541		4801			T15D		(5,000,000)	0	0	(5,000,000)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P543		4801			T15D		(4,000,000)	0	0	(4,000,000)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P24F	7811			T144			0	523,000	0	(523,000)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P23F	7811			T15L			0	162,315	0	(162,315)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P541	7811			T15D			0	2,751,800	0	(2,751,800)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P543	7811			T15D			0	2,259,498	0	(2,259,498)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P17A	7811			T15D			0	427,361	0	(427,361)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P228	7811			T15D			0	1,190,500	0	(1,190,500)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P23D	7811			T15D			0	137,534	0	(137,534)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P24B	7811			T15D			0	84,637	0	(84,637)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P24D	7811			T15D			0	82,276	0	(82,276)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P24E	7811			T15D			0	127,051	0	(127,051)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P24G	7811			T15D			0	108,500	0	(108,500)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P25F	7811			T15D			0	98,344	0	(98,344)
Sheriff-Coroner Construction and Facility Development	14Q	060	14Q	14Q-P541			9720				0	0	(98,836)	(98,836)
P2 - Community Services														
Orange County Housing Authority (OCHA)	15F	012	15F	15F-2400		4040			0000		63,548	0	0	63,548
Orange County Housing Authority (OCHA)	15F	012	15F	15F-2400			9720				0	0	(63,548)	(63,548)
OC Housing	15G	012	15G	15G-2300	7110			0000			0	785,400	0	(785,400)
OC Housing	15G	012	15G	15G-2300		2400			0000		6,653,430	0	0	6,653,430
OC Housing	15G	012	15G	15G-PH01		4200			KCCI		785,400	0	0	785,400
OC Housing	15G	012	15G	15G-2300			9720				0	0	(6,653,430)	(6,653,430)
OC Tobacco Settlement Fund	13N	017	13N	13N-5500		4800			T042		(1,684,024)	0	0	(1,684,024)
CEO Single Family Housing	15B	017	15B	15B-5300	7811			T15D			0	1,000,000	0	(1,000,000)
CEO Single Family Housing	15B	017	15B	15B-5300		3100			0000		1,000,000	0	0	1,000,000
Health Care Agency	100	042	042	042-1420	7811			T13N			0	11,147	0	(11,147)
Health Care Agency	100	042	042	042-1420		1900			0000		11,147	0	0	11,147

**Obligated Fund Balance/Net Position Adjustment Summary
(For Fiscal Year Ended June 30, 2025)**

Budget Control Name	Fund	Dept Code	Budget Control	Budget Unit	Rev Source	Object	Balance Sheet Acct	Dept Rev Code	Dept Obj Code	Dept BalSht Code	Appropriations	Revenue	Inc/Dec Reserves	Net County Cost
P2 - Community Services (Continued)														
Health Care Agency	100	042	042	042-1520	7811			T13N				0	(183,795)	0
Health Care Agency	100	042	042	042-1520		1900			0000		(183,795)	0		(183,795)
Health Care Agency	100	042	042	042-2200	7811			T13N			0	324,852	0	(324,852)
Health Care Agency	100	042	042	042-2200		1900			0000		324,852	0		324,852
Health Care Agency	100	042	042	042-2500	7811			T13N			0	124,801	0	(124,801)
Health Care Agency	100	042	042	042-2500		1900			0000		124,801	0		124,801
Health Care Agency	100	042	042	042-2600	7811			T13N			0	380	0	(380)
Health Care Agency	100	042	042	042-2600		1900			0000		380	0		380
Health Care Agency	100	042	042	042-6500	7811			T13N			0	(73,919)	0	73,919
Health Care Agency	100	042	042	042-6500		1900			0000		(73,919)	0		(73,919)
Health Care Agency	100	042	042	042-7000	7811			T13N			0	(1,887,490)	0	1,887,490
Health Care Agency	100	042	042	042-7000		1900			0000		(1,887,490)	0		(1,887,490)
P3 - Infrastructure & Environmental														
EI Toro Improvement Fund	15T	017	15T	15T-5300			9720				0	0	(600,000)	(600,000)
EI Toro Improvement Fund	15T	017	15T	15T-5300		5000			0000		300,000	0		300,000
EI Toro Improvement Fund	15T	017	15T	15T-PM26		4200			0000		300,000	0		300,000
OCWR Corrective Action Escrow	274	074	274	274-2005			9790				0	0	626,928	626,928
OCWR-FRB/Bee Canyon Landfill Escrow	284	074	284	284-2005		5000			0000		2,883,236	0	0	2,883,236
OCWR - Brea/Olinda Landfill Escrow	286	074	286	286-2005		5000			0000		3,791,969	0	0	3,791,969
OCWR-Prima Deshecha Landfill Escrow	287	074	287	287-2005		5000			0000		4,451,769	0	0	4,451,769
OC Road	115	080	115	115-0950			9720				0	0	(93,541,900)	(93,541,900)
OC Road	115	080	115	115-0950		4800			T004		93,541,900	0	0	93,541,900
South County Roadway Improvement Prog (SCRIP)	151	080	151	151-0950	7670			0000			0	(1,574,788)	0	1,574,788
OC Road - Capital Improvement Projects	174	080	174	174-0950			9720				0	0	(14,376,270)	(14,376,270)
OC Road - Capital Improvement Projects	174	080	174	174-LM03		4100			0000		6,200	0	0	6,200
OC Road - Capital Improvement Projects	174	080	174	174-P01R		1900			0000		50,000	0	0	50,000
OC Road - Capital Improvement Projects	174	080	174	174-P01R		4200			0000		326,400	0	0	326,400
OC Road - Capital Improvement Projects	174	080	174	174-P13R		3100			0000		1,032,000	0	0	1,032,000
OC Road - Capital Improvement Projects	174	080	174	174-PM06		4200			0000		200,000	0	0	200,000
OC Road - Capital Improvement Projects	174	080	174	174-PM09		3600			0000		515,000	0	0	515,000
OC Road - Capital Improvement Projects	174	080	174	174-PM21		4200			0000		1,200,000	0	0	1,200,000
OC Road - Capital Improvement Projects	174	080	174	174-PM23		4200			0000		22,000	0	0	22,000
OC Road - Capital Improvement Projects	174	080	174	174-PM32		4200			0000		482,980	0	0	482,980
OC Road - Capital Improvement Projects	174	080	174	174-PM38		4200			0000		1,390,000	0	0	1,390,000
OC Road - Capital Improvement Projects	174	080	174	174-PM42		1900			0000		100,000	0	0	100,000

**Obligated Fund Balance/Net Position Adjustment Summary
(For Fiscal Year Ended June 30, 2025)**

Budget Control Name	Fund	Dept Code	Budget Control	Budget Unit	Rev Source	Object	Balance Sheet Acct	Dept Rev Code	Dept Obj Code	Dept BalSht Code	Appropriations	Revenue	Inc/Dec Reserves	Net County Cost
P3 - Infrastructure & Environmental (Continued)														
OC Road - Capital Improvement Projects	174	080	174	174-PM43		4200			0000		60,000	0	0	60,000
OC Road - Capital Improvement Projects	174	080	174	174-PR73		4200			0000		751,690	0	0	751,690
OC Road - Capital Improvement Projects	174	080	174	174-PR96		4200			0000		1,500,000	0	0	1,500,000
OC Road - Capital Improvement Projects	174	080	174	174-PR97		4200			0000		250,000	0	0	250,000
OC Road - Capital Improvement Projects	174	080	174	174-PR98		4200			0000		2,490,000	0	0	2,490,000
OC Road - Capital Improvement Projects	174	080	174	174-PSB1		1900			0000		4,000,000	0	0	4,000,000
OC Flood Santa Ana River Mainstem/Prado Dam Capital Project	404	080	404	404-0950			9720				0	0	(7,390,000)	(7,390,000)
OC Flood Santa Ana River Mainstem/Prado Dam Capital Project	404	080	404	404-L300		4100			0000		7,390,000	0	0	7,390,000
Airport - Operating	280	280	280	280-0600		5000			0000		9,934,269	0	0	9,934,269
Airport Construction Fund	281	280	281	281-0600		5000			0000		9,357,569	0	0	9,357,569
Airport Debt Service Fund	283	280	283	283-0600		5000			0000		9,371,555	0	0	9,371,555
OCWR Capital Project Fund	273	299	273	273-P772		4200			0000		1,200,000	0	0	1,200,000
OCWR Capital Project Fund	273	299	273	273-P797		4200			0000		4,200,000	0	0	4,200,000
OCWR Capital Project Fund	273	299	273	273-P798		4200			0000		1,107,731	0	0	1,107,731
OCWR-Environmental Reserve	275	299	275	275-2005			9760				0	0	1,972,099	1,972,099
OCWR - Landfill Post-Closure Maintenance	279	299	279	279-2005			9760				0	0	5,986,585	5,986,585
OCWR - Landfill Post-Closure Maintenance	279	299	279	279-2005		7812			T299		0	30,000,000	0	(30,000,000)
OC Waste & Recycling Enterprise	299	299	299	299-2005		4802			T279		30,000,000	0	0	30,000,000
OC Waste & Recycling Enterprise	299	299	299	299-2005			9760				0	0	(30,000,000)	(30,000,000)
OC Waste & Recycling Enterprise	299	299	299	299-2005		5000			0000		8,577,452	0	0	8,577,452
OC Waste & Recycling Enterprise	299	299	299	299-6105		1900			0000		800,000	0	0	800,000
OC Waste & Recycling Enterprise	299	299	299	299-6105		1900			0000		170,000	0	0	170,000
OC Waste & Recycling Enterprise	299	299	299	299-7405		1900			0000		850,000	0	0	850,000
P4 - General Government Services														
OC CARES Fund	12M	017	12M	12M-5600		4801			T15D		(469,196)	0	0	(469,196)
OC CARES Fund	12M	017	12M	12M-5600		5000			0000		28,658,739	0	0	28,658,739
OC CARES Fund	12M	017	12M	12M-5600			9720				0	0	(28,189,543)	(28,189,543)
County Strategic Planning and Board Initiatives	12N	017	12N	12N-5500	7811			T15D			0	18,618,668	0	(18,618,668)
County Strategic Planning and Board Initiatives	12N	017	12N	12N-5500		5000			0000		(515,541)	0	0	(515,541)
P5 - Capital Improvements														
Countywide IT Projects Non-General Fund	15I	017	15I	15I-151C	7812			T289			0	5,400,000	0	(5,400,000)
Countywide IT Projects Non-General Fund	15I	017	15I	15I-151C		5000			0000		5,400,000	0	0	5,400,000
Countywide IT Projects Non-General Fund	15I	017	15I	15I-151C		5000			0000		1,138,283	0	0	1,138,283
Countywide IT Projects Non-General Fund	15I	017	15I	15I-1A06		1900			0000		(20,534)	0	0	(20,534)

**Obligated Fund Balance/Net Position Adjustment Summary
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Budget Control Name	Fund	Dept Code	Budget Control	Budget Unit	Rev Source	Object	Balance Sheet Acct	Dept Rev Code	Dept Obj Code	Dept BalSht Code	Appropriations	Revenue	Inc/Dec Reserves	Net County Cost
P5 - Capital Improvements (Continued)														
Countywide IT Projects Non-General Fund	151	017	151	151-1116		1940			0000		(148,878)	0	0	(148,878)
Countywide IT Projects Non-General Fund	151	017	151	151-1M09		5000			0000		403,296	0	0	403,296
Countywide IT Projects Non-General Fund	151	017	151	151-1N01		1940			0000		158,644	0	0	158,644
Countywide IT Projects Non-General Fund	151	017	151	151-1N07		1940			0000		41,794	0	0	41,794
Countywide IT Projects Non-General Fund	151	017	151	151-1P03		1940			0000		20,000	0	0	20,000
Countywide IT Projects Non-General Fund	151	017	151	151-1999			9744				0	0	(1,592,605)	(1,592,605)
CFD 2021-1 RMV (Rianda) Construction Fund	565	017	565	565-5300		3100			0000		(955,264)	0	0	(955,264)
CFD 2023-1 RMV (Rianda Ph 2B) Construction Fund	567	017	567	567-5300		2400			0000		(1,719,925)	0	0	(1,719,925)
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PM18		4200			0000		(663,546)	0	0	(663,546)
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PM18	7110			0000			0	(194,350)	0	194,350
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PM18	7811			T12M			0	(469,196)	0	469,196
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PP13		4200			0000		(108,500)	0	0	(108,500)
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PP13		4801			T14Q		108,500	0	0	108,500
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-P14Q		4801			T14Q		2,147,703	0	0	2,147,703
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PK22		4801			T14Q		5,011,298	0	0	5,011,298
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PK22	7811			T14Q			0	(9,000,000)	0	9,000,000
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PK22		5000			0000		(9,000,000)	0	0	(9,000,000)
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-1100		4801			T15B		1,000,000	0	0	1,000,000
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-PL21		4801			T12N		18,618,668	0	0	18,618,668
Countywide Capital Projects Non-General Fund	15D	036	15D	15D-P000		5000			0000		(37,832,418)	0	0	(37,832,418)
800 Mhz Cccs	15L	060	15L	15L-9360		4801			T14Q		162,315	0	0	162,315
800 Mhz Cccs	15L	060	15L	15L-9360		5000			0000		(162,315)	0	0	(162,315)
P6 - Debt Service														
Santa Margarita CFD 86-1(Ser '88) Debt Service	488	017	488	488-5300		1900			0000		(1,184)	0	0	(1,184)
Irvine Coast Assessment District 88-1 Debt Service	507	017	507	507-5300		1900			0000		(721)	0	0	(721)
Rancho Santa Margarita CFD 87-5b Debt Service	509	017	509	509-5300		1900			0000		(954)	0	0	(954)
Coto De Caza CFD 87-8 Debt Service	513	017	513	513-5300		1900			0000		(1,094)	0	0	(1,094)
Rancho Santa Margarita CFD 87-5c Debt Service	517	017	517	517-5300		1900			0000		(54)	0	0	(54)
Rancho Santa Margarita CFD 87-5d(A) Debt Service	521	017	521	521-5300		1900			0000		(78)	0	0	(78)
Rancho Santa Margarita CFD 87-5e(A93) Debt Service	549	017	549	549-5300		1900			0000		(1,265)	0	0	(1,265)
Assessment District 92-1 Newport Ridge Debt Service	551	017	551	551-5300		1900			0000		(730)	0	0	(730)
P7 - Insurance, Reserves & Miscellaneous														
Miscellaneous	100	017	004	004-5500	7811			T115			0	93,541,900	0	(93,541,900)
Miscellaneous	100	017	004	004-5500		4802			T294		93,541,900	0	0	93,541,900
OCIT Countywide Services	289	017	289	289-3317			9760				0	0	3,380,085	3,380,085

Obligated Fund Balance/Net Position Adjustment Summary
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Budget Control Name	Fund	Dept Code	Budget Control	Budget Unit	Rev Source	Object	Balance Sheet Acct	Dept Rev Code	Dept Obj Code	Dept BalSht Code	Appropriations	Revenue	Inc/Dec Reserves	Net County Cost
P7 - Insurance, Reserves & Miscellaneous (Continued)														
OCIT Countywide Services	289	017	289	289-3317			9760				0	0	(5,400,000)	(5,400,000)
OCIT Countywide Services	289	017	289	289-3317		4801			T15I		5,400,000	0	0	5,400,000
Insured Health Plans ISF	290	017	290	290-2000		5000			0000		997,049	0	0	997,049
Unemployment ISF	291	017	291	291-2000		5000			0000		95,688	0	0	95,688
Self-Insured PPO Health Plans ISF	292	017	292	292-2000		5000			0000		(2,072,938)	0	0	(2,072,938)
Workers' Compensation ISF	293	017	293	293-5605		3520			0000		47,146	0	0	47,146
Property & Casualty Risk ISF	294	017	294	294-5710	7810			T004			0	93,541,900	0	(93,541,900)
Property & Casualty Risk ISF	294	017	294	294-5710		3500			0000		93,545,467	0	0	93,545,467
Self-Insured Benefits ISF	298	017	298	298-2000		5000			0000		(206,886)	0	0	(206,886)
Wellness Program Internal Service Fund	29W	017	29W	29W-2000		5000			0000		257,502	0	0	257,502
Life Insurance ISF	29Z	017	29Z	29Z-2000		5000			0000		(3,987)	0	0	(3,987)
OC Printing & Graphics	297	031	297	297-3200			9760				0	0	(1,089,116)	(1,089,116)
Compressed Natural Gas Enterprise Fund	270	080	270	270-3710			9760				0	0	448,227	448,227
Compressed Natural Gas Enterprise Fund	270	080	270	270-3710		5000			0000		10,200	0	0	10,200
OC Fleet Services	296	080	296	296-3710		9821					0	0	351,148	351,148
OC Fleet Services	296	080	296	296-3710		9770					0	0	(351,148)	(351,148)
OC Fleet Services	296	080	296	296-3710		9770					0	0	351,148	351,148
OC Fleet Services	296	080	296	296-3710		5000			0000		(2,351,148)	0	0	(2,351,148)
OC Fleet Services	296	080	296	296-3710		5300			0000		(932,311)	0	0	(932,311)
Grand Total											398,173,603	228,760,653	(176,230,176)	(6,817,226)



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COUNTY OF ORANGE

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CLASSIFICATION MAINTENANCE STUDIES

RECOMMENDED ACTIONS – CLASSIFICATION MAINTENANCE STUDIES

5. Effective October 3, 2025, approve revised classification specifications for Capital Projects Administrator (Title Code 8181MA), Capital Projects Manager (Title Code 8182MA), and Capital Projects Manager, Senior (Title Code 8163MA); and approve new title code, title description, classification specification, and set pay grade for Capital Projects Assistant Deputy Director (Title Code 8184MA).
6. Effective October 3, 2025, approve revised classification specifications and adjust pay grades and recruiting steps for Fleet Technician I (Title Code 3300OS), Fleet Technician II (Title Code 3301OS), Fleet Technician III (Title Code 3302OS), and Supervising Fleet Technician (Title Code 3303SM).
7. Effective October 3, 2025, approve and adopt Side Letter Agreement between the County of Orange and Teamsters, Local 952, to increase the Automotive Service Excellence (ASE) certification premium pay included as Attachment I.
8. Effective October 3, 2025, approve and adopt Side Letter Agreement between the County of Orange and Orange County Employees Association (OCEA), to increase the Automotive Service Excellence (ASE) certification premium pay included as Attachment J.
9. Effective October 3, 2025, approve revised classification specifications and adjust pay grades for Health Services Analyst (Title Code 8228MA), Health Services Administrator (Title Code 8229MA), Health Services Manager (Title Code 8230MA), Health Services Manager, Senior (Title Code 8231MA), Health Services Assistant Deputy Director (Title Code 8232MA), and Health Services Deputy Director (Title Code 8233MA).
10. Effective October 3, 2025, approve revised classification specifications for Public Information and Affairs Analyst (Title Code 8277MA), Public Information and Affairs Administrator (Title Code 8278MA), Public Information and Affairs Manager (Title Code 8279MA), and Public Information and Affairs Manager, Senior (Title Code 8280MA); Public Information and Affairs Assistant Deputy Director (Title Code 8281MA); and approve new title code, title description, classification specification, and set pay grade for Public Information and Affairs Deputy Director (Title Code 8287MA).

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- ~~11. Effective October 3, 2025, approve revised title description and classification specification for Associate Medical Director (Title Code 8261MA).~~
12. Effective October 3, 2025, approve revised title descriptions, classification specifications, and adjust pay grades for Assistant Research Analyst (Title Code 8373GE), Research Analyst (Title Code 8371GE), Senior Research Analyst (Title Code 8374GE), and Supervising Research Analyst (Title Code 8372SM); approve deletion of Research Analyst I (Title Code 8369GE) and direct Human Resource Services to remove the obsolete classification from all Orange County Plan documents.
13. Effective October 3, 2025, approve and adopt Side Letter Agreement between the County of Orange and Orange County Managers Association (OCMA), that will allow employees holding the title of Medical Services Manager, Medical Services Manager, Senior, and Medical Services Assistant Medical Director to maintain their current title until they vacate their current position, included as Attachment K.

BACKGROUND INFORMATION:

With Board approval of the current Memoranda of Understanding between the Orange County Employees Association (OCEA), Teamsters, Local 952, and the Orange County Managers Association (OCMA) and the County of Orange (County), along with requests by County departments, Human Resource Services (HRS) conducted multiple classification maintenance studies. Included for Board consideration and approval are a variety of recommendations impacting the pay ranges, title codes, title descriptions, and/or class specifications for the Capital Projects Management series, Fleet Technician series, Health Services Management series, Research Analyst series, and Public Information and Affairs series along with the adoption of three side letter agreements with OCEA, OCMA, and Teamsters.

The goal of the maintenance studies was to update the classification specifications, review the organizational structure of the occupational series, and evaluate the current salaries in relation to comparable public employer organizations. The maintenance study ensures that the job descriptions, working conditions, and minimum qualifications are accurate, and compensation is fair and competitive.

Maintenance Study Process

The maintenance study process involves analysis to identify the need to create, modify, or delete classifications, update, or create job duties described in classification specifications, identify necessary changes to minimum qualifications, and delineate the physical, environmental, and mental characteristics of a classification. HRS reviews comparable classification specifications from local jurisdictions and collaborates with department management, subject matter experts, and labor organizations to review and update existing classification specifications. Changes to classification specifications ensure that: the duties and levels of responsibility are current; the classification occupational series have the appropriate structure to meet departmental workload demands in an efficient manner; and minimum qualifications are at an appropriate level to attract candidates with the necessary skills, knowledge, and abilities to perform the expected duties.

The market salary study and analysis consist of identifying comparators from surrounding public agencies to determine if current salaries are consistent with market salary averages. If it is determined that the minimum salary of a proposed pay grade is below the average within the market or is below the previously advertised minimum salary for the classification, an advanced recruiting step may be requested. HRS analyzes data from previous recruitments and internal employee separation reports and reviews current staffing levels to determine if current salaries affect employee recruitment and retention.

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In addition to identifying comparable salaries, comparators' current labor agreements are reviewed to identify and consider additional premium pay, allowances, and future negotiated salary adjustments offered by comparators.

Capital Projects Management Series

Positions in the Capital Projects Management series are assigned to the OC Public Works (OCPW), OC Waste and Recycling (OCWR), OC Community Resources (OCCR), OC Sheriff's Department (OCSD) and John Wayne Airport (JWA). The Capital Projects Management series is currently comprised of three levels: Capital Projects Administrator, Capital Projects Manager and Capital Projects Manager, Senior. This occupational series is responsible managing a variety of major maintenance and building tenant improvements, including facility master-planning. The study initiated the need for a higher role within the Capital Projects Management series to meet current and future business needs.

HRS conducted a market salary survey and determined the Capital Projects Management series is above the market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to Capital Projects Manager, Senior:

Organization	Title Description	Max Monthly Pay
County of Los Angeles	Senior Capital Projects Manager, Public Works	\$15,020
City of Irvine	Principle Project Manager	\$14,770
County of Riverside	Facilities Operations Manager	\$13,220
City of Long Beach	Capital Projects Coordinator IV	\$13,147
County of San Bernardino	Capital Improvement Supervising Project Manager	\$12,026
	Average Monthly Maximum	\$13,637
County of Orange	Capital Projects Manager, Senior	\$15,978
	Variance Above Market Average	14.65%

Based on the market findings, internal equity analysis, and assessment of the existing classification structure, HRS recommends revising class specifications for the Capital Projects Administrator, Manager, and Manager, Sr. classes; and creating new title code, title description, class specification, and setting pay grade for the Capital Projects Assistant Deputy Director as follows:

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Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Pay Range	Title Code	Title Description	Pay Grade & Monthly Pay Range
8181MA	Capital Projects Administrator	M-3 \$8,807 - \$13,206	8181MA	Capital Projects Administrator	M-3 \$8,807 - \$13,206
8182MA	Capital Projects Manager	M-4 \$9,688 - \$14,527	8182MA	Capital Projects Manager	M-4 \$9,688 - \$14,527
8183MA	Capital Projects Manager, Senior	M-5 \$10,657 - \$15,978	8183MA	Capital Projects Manager, Senior	M-5 \$10,657 - \$15,978
			8184MA	Capital Projects Assistant Deputy Director	M-6 \$11,723 - \$17,574

Note: Pay range reflects minimum to performance maximum

Based on our findings, HRS recommends the addition of an Assistant Deputy Director level in the Capital Projects Management occupational series. The Capital Projects Assistant Deputy Director classification will oversee and manage a departmental capital projects division comprised of multiple sections or units involved in the construction of infrastructure projects (i.e., roads, bridges, sidewalks, harbors, beaches, trails, flood control facilities). The addition of the class will also address and resolve the use of the broader management occupational series (Business Services) to oversee units responsible for capital improvement projects. OCSD is currently utilizing the Business Services Deputy Director class to oversee their capital projects unit; we are proposing to crosswalk the employee from Business Services Deputy Director to the newly created Capital Projects Assistant Deputy Director class. There would be no negative impact to employee as their pay grade will remain the same. For the Capital Projects Administrator, Manager, and Manager, Sr., since all classes are above market averages, with the County consistently ranking near the top across all levels, we are proposing revised class specifications with no salary adjustments.

The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed		% Change (Perf Max)
Position Count	Title Description	Position Count*	Title Description	
4	Capital Projects Administrator	4	Capital Projects Administrator	0%

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Currently Budgeted		Proposed		% Change (Perf Max)
Position Count	Title Description	Position Count*	Title Description	
2	Capital Projects Manager	2	Capital Projects Manager	0%
7	Capital Projects Manager, Senior	7	Capital Projects Manager, Senior	0 %
2	Business Services Assistant Deputy Director	2	Capital Projects Assistant Deputy Director	0%
15	Total	15	Total	0 %

*Position count reflects totals following position reallocations to new Capital Projects Assistant Deputy Director class after BOS approval.

Fleet Technician Series

Positions in the Fleet Technician series are assigned to OC Public Works (OCPW). The Fleet Technician series consists of Fleet Technician I, Fleet Technician II, Fleet Technician III, and Supervising Fleet Technician, which overhaul and repair a wide variety of gasoline, electric, diesel, and natural gas-powered heavy, medium, and light duty vehicles.

HRS conducted a market salary survey and determined that the pay range for the journey-level, Fleet Technician II classification is 0.81% above the market average. The following table displays a comparison of salaries from surrounding organizations for the classifications equivalent to the Fleet Technician II:

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Organization	Title Description	Max Monthly Pay
City of Los Angeles	Heavy Duty Equipment Mechanic	\$9,409
City of Los Angeles	Auto Body Builder and Repairer	\$8,490
City of Los Angeles	Equipment Mechanic	\$8,164
City of Santa Ana	Fleet Services Technician II	\$8,077
City of San Diego	Fleet Technician	\$8,076
City of Irvine	Equipment Mechanic	\$7,691
County of Los Angeles	Power Equipment Technician	\$7,459
County of San Bernardino	Fleet Technician II	\$7,344
County of Ventura	Heavy Equipment Mechanic II	\$7,308
County of San Diego	Senior Fleet Technician	\$7,297
County of San Diego	Senior Fleet Technician	\$7,297
County of Riverside	Heavy Equipment Mechanic	\$7,281
City of San Diego	Body and Fender Mechanic	\$7,069
City of Anaheim	Vehicle Technician II	\$7,001
City of Long Beach	Equipment Mechanic I	\$6,994
County of Riverside	Automotive Mechanic II	\$6,933
County of Ventura	Automotive Mechanic II	\$6,892
County of Ventura	Body/Paint Mechanic	\$6,887
	Average Monthly Maximum	\$7,551
County of Orange	Fleet Technician II	\$7,613
	Variance Above Market Average	0.81%

*Max Monthly Amount includes base pay + ASE premium pay

Based on the external market, internal equity analysis, recruitment/retention issues identified, and assessment of the existing classification structure, HRS requests approval

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to revise class specifications, and to adjust pay grades and recruiting step for the Fleet Technician series as follows:

Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
3300OS	Fleet Technician I	T-23 \$4,846 - \$6,529	3300OS	Fleet Technician I	T-23 \$4,846 - \$6,529
3301OS	Fleet Technician II	T-28 \$5,554 - \$7,483 (Recruiting Step 1)	3301OS	Fleet Technician II	T-29 \$6,358 - \$7,682 (Recruiting Step 5)
3302OS	Fleet Technician III	T-31 \$6,022 - \$8,114	3302OS	Fleet Technician III	T-32 \$6,186 - \$8,336
3303SM	Supervising Fleet Technician	C-36 \$6,705 - \$9,034	3303SM	Supervising Fleet Technician	C-37 \$6,888 - \$9,282

In addition to base pay and recruiting step adjustments, HRS also recommends approval and adoption of a Side Letter Agreement between the County and Teamsters and a Side Letter Agreement between the County and OCEA that will increase the Automotive Service Excellence (ASE) certification premium pay for the Fleet Technician classification series from \$0.55/hour for possessing four (4) to seven (7) ASE certs to \$0.75/hour and from \$0.75/hour for possessing eight (8) or more ASE certifications to \$1.25/hour. The increase in the premium pay will better align the County to the ASE premium pays offered at our comparable counties and cities. Currently there are 39 fleet technicians receiving the ASE certification premium pay at OC Public Works (OCPW), of which 21 possess eight (8) or more ASE certifications. The department will attempt to absorb the approximate \$29,328 in annual cost of implementing the proposed change.

The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
1	Fleet Technician I	1	Fleet Technician I	0.00%
43	Fleet Technician II	43	Fleet Technician II	2.66%
6	Fleet Technician III	6	Fleet Technician III	2.73%
5	Supervising Fleet Technician	5	Supervising Fleet Technician	2.74%
55	Total	55	Total	

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If all positions are filled, OCPW will attempt to absorb the approximate \$182,432 annual cost of implementing the proposed changes as follows:

Classification Title	Approximate Annual Cost	Funding Source	Approximate Net County Cost
Fleet Technician I*	\$0	100% Fees or Charges	\$0
Fleet Technician II	\$141,707	100% Fees or Charges	\$0
Fleet Technician III	\$20,424	100% Fees or Charges	\$0
Supervising Fleet Technician	\$20,301	100% Fees or Charges	\$0
Total	182,432	Total	\$0

*Positions are budgeted at the Fleet Technician II class

Health Services Management Series

Positions in this series are responsible for coordinating, administering, and/or managing a health care services function that includes multiple units and/or programs providing services related to behavioral health, correctional health, emergency medical, public health, specialized medical, and/or other health services.

HRS conducted a market salary survey and determined that the pay range for the journey-level, Health Services Manager, Senior classification is 2.84% above the market average. The following table displays a comparison of salaries from surrounding organizations for the classifications equivalent to the Health Services Manager, Senior:

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Organization	Title Description	Maximum Monthly Pay
County of Riverside	Clinical Director of Nursing Services I	\$18,641
County of Riverside	Assistant Director of Nursing Services	\$16,434
County of Los Angeles	Mental Health Program Manager III	\$16,417
County of Los Angeles	Clinical Director of Nursing Services I	\$16,417
County of Los Angeles	Emergency Medical Services Assistant Director	\$16,417
County of Ventura	Director Public Health Nursing	\$15,907
County of San Bernardino	Public Health Division Chief	\$15,529
County of Riverside	Healthcare Administrative Manager	\$15,189
County of Ventura	Public Health Division Manager	\$15,018
County of San Diego	Director of Nursing	\$14,752
County of Ventura	Emergency Services (EMS) Administrator	\$14,600
County of Riverside	Director of Nursing Services – Public Health	\$14,375
County of Ventura	Senior Behavioral Health Manager	\$14,039
County of Riverside	County Emergency Medical Services Administrator	\$13,140
County of Riverside	Mental Health Services Administrator	\$13,061

Organization	Title Description	Maximum Monthly Pay
County of San Bernardino	Correctional Mental Health Services Manager	\$12,941
	Average Monthly Maximum	\$15,180
County of Orange	Health Services Manager, Senior	\$14,761
	Variance Below Market Average	2.84%

Based on the external market, internal equity analysis, and assessment of the existing classification structure, HRS requests approval to revise title descriptions, class specifications, and adjust pay grades for the Health Services Management series as follows:

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Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
8228MA	Health Services Analyst	M-2 \$8,006 - \$12,003	8228MA	Health Services Analyst	M-2 \$8,006 - \$12,003
8229MA	Health Services Administrator	M-3 \$8,807 - \$13,206	8229MA	Health Services Administrator	M-3 \$8,807 - \$13,206
8230MA	Health Services Manager	M-4 \$9,688 - \$14,527	8230MA	Health Services Manager	M-4 \$9,688 - \$14,527
8231MA	Health Services Manager, Sr.	M-5 \$10,657 - \$15,978	8231MA	Health Services Manager, Sr.	M-6 \$11,723 - \$17,574
8232MA	Health Services Assistant Deputy Director	M-6 \$11,723 - \$17,574	8232MA	Health Services Assistant Deputy Director	M-7 \$12,896 - \$19,332
8233MA	Health Services Deputy Director	M-7 \$12,896 - \$19,332	8233MA	Health Services Deputy Director	M-8 \$14,186 - \$21,266

Note: Pay range reflects minimum to performance maximum

The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
12	Health Services Analyst	12	Health Services Analyst	0%
19	Health Services Administrator	19	Health Services Administrator	0%
34	Health Services Manager	40	Health Services Manager*	0%
14	Health Services Manager, Sr.	21	Health Services Manager, Sr.*	9.99%
9	Health Services Assistant Deputy Director	11	Health Services Assistant Deputy Director*	10.00%
1	Health Services Deputy Director	1	Health Services Deputy Director	9.74%
89	Total	104	Total	

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*Total number of positions per classification include movement of Medical Services positions into Health Services classifications

In addition to base pay adjustments, HRS also recommends approval and adoption of a Side Letter Agreement between the County and OCMA that will allow specified employees holding the title of Medical Services Manager and Medical Services Manager, Senior as of the effective date of implementation of the Health Services management occupational series will maintain their current title until they vacate their current position, at which time the position will be reallocated to the appropriate class within the Health Services management classification. The Medical Services Manager and Medical Services Manager, Senior, classifications will be deleted once the last position is vacated.

Through attrition, with all positions reallocated to the appropriate classes within the Health Services Management series and filled, HCA will attempt to absorb the approximate \$194,538 annual cost of implementing the proposed changes as follows:

Occupational Series	Approximate Annual Cost	Funding Source	Approximate Net County Cost
Health Services Management	\$194,538	*See Note	*Unspecified
Total	\$194,538		*Unspecified

*Note: There are a total of 104 positions, within six classifications, assigned to four (4) divisions with HCA (Behavioral Health, Correctional Health, Public Health, Specialized Medical). Each division funding source(s) consists of a variety of baseline sources allocated from Net County Cost (NCC), Federal and State funds, Fees, and/or Other and vary from one to another.

Public Information and Affairs Deputy Director

The County Executive Officer requested HRS explore and study the creation of a new classification in the Public Information and Affairs Management series. The study emphasized the need for a higher-level role within the CEO Government and Community Affairs division to meet the current and future business needs. The newly proposed Public Information and Affairs Deputy Director classification will be responsible for overseeing the County's federal and state legislative affairs initiatives, communications, and public affairs function. Incumbent serves as a principal advisor to the Chief Operating Officer with responsibilities for department-wide management of public information, legislative affairs and/or public affairs work. In addition, the class will be responsible for leading high-level strategic initiatives, promote transparency and trust, and support the County's mission to serve the public through effective governance and communication and will be exclusive to the County Executive Office.

HRS conducted a market salary analysis to determine the market average for Public Information and Affairs Deputy Director. The following table displays a comparison of

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salaries from surrounding organizations for the classification equivalent to the Public Information and Affairs Deputy Director.

Organization	Title Description	Max Monthly Pay
County of Los Angeles	Senior Manager CEO	\$26,404
County of San Diego	Director-County Communications Office	\$24,794
County of San Diego	Director-Office of Economic Development and Governmental Affairs	\$24,794
City of Long Beach	Director of Communications	\$22,181
City of Irvine	Director of Communications & Engagement	\$21,339
County of San Bernardino	Chief Communications Officer	\$19,802
City of Anaheim	Chief Communications Officer	\$18,603
County of San Bernardino	Director of Legislative Affairs	\$17,210
County of Riverside	Public Information Officer	\$16,636

Organization	Title Description	Max Monthly Pay
County of Ventura	Public Information Officer-E	\$14,949
City of Santa Ana	Public Affairs Information Officer (Expected)(AM)	\$12,527
	Average Monthly Maximum	\$19,931
County of Orange	Public Information and Affairs Deputy Director	\$17,859
	Variance Below Market Average	11.60%

Following review of initial findings and based on a comprehensive review of external market data, internal equity analysis, and an assessment of the current business needs, HRS recommends creating a new title code, title description, classification specification, and setting the pay grade for the Public Information and Affairs Deputy Director classification as follows:

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Title Code	Title Description	Pay Grade & Monthly Range
8287MA	Public Information and Affairs Deputy Director	M-7 \$12,896 - \$19,332

Note: Pay range reflects minimum to performance maximum

While the market analysis shows the recommended pay grade is below the market average for this classification, due to internal equity the recommended pay grade is M-7. Currently, the County Executive Office is utilizing the Business Services Deputy Director classification to meet their operational need. Since the Business Services Deputy Director classification is on the M-7 salary grade there will be no cost to the Department following reallocation their one (1) position to the Public Information and Affairs Deputy Director after approval.

Research Analyst Series

Research Analysts conduct applied research and statistical analysis to evaluate the effectiveness, impact and needs of County programs and services. This series assists departments in evaluating program effectiveness, identifying operational needs, and developing evidence-based recommendations. The positions in this series are assigned throughout the County and may be allocated at various levels based on their scope of responsibility and complexity of work.

HRS conducted a market salary survey and determined that the pay range for the Research Analyst III classification is 11.44% above market average. The following table displays a comparison of salaries from surrounding public sector organizations for classifications equivalent to Research Analyst III (journey-level):

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Organization	Title Description	Maximum Monthly Pay
County of San Diego	Operations Research Analyst	\$8,660
County of San Bernardino	Statistical Analyst	\$8,254
County of San Bernardino	Law and Justice Research Analyst	\$8,112
County of San Diego	Statistician	\$8,069
County of Riverside	Research Specialist I	\$7,915
County of Los Angeles	Research Analyst II, Behavioral Sciences	\$7,719
County of Riverside	Research Analyst	\$7,134
County of Los Angeles	Statistical Analyst, Sheriff	\$6,625
County of Los Angeles	Statistical Analyst, Health	\$6,275
	Average Monthly Maximum	\$7,640
County of Orange	Research Analyst III	\$8,627
	Variance Above Market Average	11.44%

Based on the market findings and assessment of the internal salaries, the current compensation for the series is competitive with external market. However, HRS recommends transitioning the series from the A4-schedule to the C-schedule, consistent with the agreement with the union. HRS also requests approval to consolidate the entry and intermediate levels of the Research Analyst series into a single entry-level classification by deleting the Research Analyst I, retitling the Research Analyst II to Assistant Research Analyst, retitling the Research Analyst III to Research Analyst, retitling the Research Analyst IV to Senior Research Analyst, and retitling the Senior Research Analyst to Supervising Research Analyst. This change replaces the numerical title with descriptive titles to provide clear delineation between the levels and aligns the structure with surrounding counties. This recommendation also includes revising the classification specifications and adjusting the pay grades for the Research Analyst series as follows:

Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
8369GE	Research Analyst I	A4-48 \$4,793 - \$6,401		Delete Classification	

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Current			Proposed		
Title Code	Title Description	Pay Grade & Monthly Range	Title Code	Title Description	Pay Grade & Monthly Range
8373GE	Research Analyst II	A4-52 \$5,320 - \$7,122	8373GE	Assistant Research Analyst	C-28 \$5,396 - \$7,270
8371GE	Research Analyst III	A4-59 \$6,401 - \$8,627	8371GE	Research Analyst	C-35 \$6,524 - \$8,793
8374GE	Research Analyst IV	A4-63 \$7,122 - \$9,589	8374GE	Senior Research Analyst	C-39 \$7,270 - \$9,797
8372SM	Senior Research Analyst	A4-67 \$7,953 - \$10,693	1860SM	Supervising Research Analyst	C-43 \$8,107 - \$10,923

HRS recommends the deletion of the Research Analyst I classification to streamline and consolidate the occupational series structure. The proposed structure would align with surrounding counties by maintaining only an entry-level, journey-level, and advanced journey-level, and supervisory-level, without an intermediate level between the entry and journey. The proposed deletion will not negatively impact current employees, as there are no budgeted positions in this classification and the sole incumbent classified as a Research Analyst I is underfilled from a budgeted Research Analyst II position.

The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed		% Change (Top Step)
Position Count	Title Description	Position Count	Title Description	
0	Research Analyst I	Delete Classification		
4	Research Analyst II	4	Assistant Research Analyst	2.07%
27	Research Analyst III	27	Research Analyst	1.93%
30	Research Analyst IV	30	Senior Research Analyst	2.17%
10	Senior Research Analyst	10	Supervising Research Analyst	2.16%
71	Total	71	Total	

If all positions are filled, departments will attempt to absorb the approximate \$232,102 annual cost of implementing the proposed changes as follows:

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Classification Title	Approximate Annual Cost	Funding Source	Approximate Net County Cost
Research Analyst Series	\$232,102	*See Note	*Unspecified
Total	\$232,102		*Unspecified

*Note: There are a total of 71 positions, within five classifications, assigned to seven departments (Child Support Services, District Attorney's Office, Health Care Agency, Probation, Office of Independent Review, OCSD, and Social Services Agency). Each department funding source(s) consists of a variety of baseline sources allocated from Net County Cost (NCC), Enterprise funds, Federal and State funds, and/or charge for services and vary from one to another. The percent breakdown of funding for each department unit(s) ranges from 100% NCC to 100% Enterprise funds, or a combination of sources thereof.



CAPITAL PROJECTS ADMINISTRATOR

Bargaining Unit: MA Administrative Management

Class Code:
8181MA

COUNTY OF ORANGE
Established Date: March 10,
2023
Revision Date: October 3,
2025

DEFINITION:

This class is the first in a four-level **Capital Project Management Series** responsible for managing vertical and horizontal capital construction projects and programs including scope development, project documentation, cost estimating, project monitoring, payables, change order authorization, quality control, FF&E (furniture, fixtures, and equipment), project research, project tracking, and construction inspection, which includes supervision of non-management staff.

The Capital Project Management series includes the following:

Capital Projects Administrator (8181MA)
Capital Projects Manager (8182MA)
Capital Projects Manager, Senior (8183MA)
Capital Projects Assistant Deputy Director (8184MA)

CLASS CHARACTERISTICS:

An incumbent performs advanced journey-level construction project management and/or program administration which includes performing the most complex individual contributor work assignments or supervision of a smaller program/function. Incumbents may supervise multiple staff engaged in non-management work, provide training and work review for same level management staff, or supervise a management level staff assigned to help support and coordinate the program and/or work unit. Decision-making includes providing input into management objectives and selecting the method to address a problem or issue, subject to the constraints established by management objectives and direction.

As assigned, an incumbent may serve as a lead worker, assigning work and monitoring work completion; or supervise staff, volunteers and/or contractors, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Performs project and or program management work while leading project teams; prepares, manages, and monitors project scope, plans, budgets, and schedules; identifies, monitors, and mitigates risk; identifies, quantifies, and assigns resources; ensures compliance with performance and quality standards; and maintains project documentation.
2. Develops and maintains project and program administrative, procedural, programmatic and contractual needs, such as governance, tools and templates, which ensure a continuous process of monitoring and analyzing schedule and cost, and reporting on project and/or program progress, status and performance.
3. Performs procurement, budgeting, financial and accounting tasks for assigned program(s); monitors and manages the procurement process; prepares forecasts, prepares and reviews budget requests; researches and reviews funding opportunities; collects and analyzes financial information; monitors contract use and expenditures; processes payments; develops and maintains metrics reporting; and makes budgetary and financial recommendations to higher-level staff.
4. Maintains ongoing communications with project stakeholders; responds to inquiries and/or complaints from vendors, the general public, internal staff, and/or external agencies; troubleshoots program-related operational issues; and facilitates and/or attends meetings.
5. Establishes research criteria, gathers information and/or leads the information gathering process, analyzes information, and uses technical and analytical expertise to develop findings and provide recommendations to higher-level staff.
6. Administers smaller, less complex capital improvement projects, programs, or specific functional areas of large complex programs; plans and conducts studies, surveys, training sessions, and investigations; administers program/project budget and procurement activities.
7. Researches and develops original reports, materials, presentations, and other documents; serves as technical subject matter expert; reviews materials prepared by others; makes presentations, as assigned.
8. As assigned, supervises transactional, investigatory, or processing operational activities performed by non-exempt staff; and assists with overall operational management of a work unit including the identification of business processes and opportunities for continuous improvement, drafting of operational policies and procedures, and measurement and analysis of performance indicators.
9. As assigned, serves as a lead worker, or supervises staff, volunteers, and/or contractors, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
10. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:

Knowledge of

- Principles and practices of managing and administering capital improvement and maintenance programs and projects
- Principles and practices of project and program management and administration

- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations and written reports
- Principles and practices of modern budget administration, cost estimating, and procurement
- Supervisory principles, practices, and techniques, including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles and practices of conflict resolution and negotiation strategies
- Best practices, trends, and emerging technologies
- Applicable federal, state, and local laws, codes, and regulations
- Service delivery principles and practices
- Principles in providing exceptional customer service
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Effectively manage and administer capital infrastructure and maintenance programs, projects, and activities
- Prioritize multiple competing work priorities and meeting deadlines
- Research and analyze data, formulate issues, and articulate recommendations
- Monitor and interpret operational data, regulatory and financial information, and statistics
- Administer budgets, estimating costs, and coordination of procurements, which may include negotiating contracts and coordination of FF&E installations
- Develop and prepare reports and presentations
- Recommend and implement policies and procedures
- Resolve conflict and facilitate consensus
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work, as assigned
- Interpret and apply applicable laws, codes, regulations, and standards

- Provide exceptional customer service
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

Four (4) years of professional capital construction project management experience related to assignment.

A bachelor's degree in civil engineering, construction management, architecture, or directly related field may substitute for one (1) year of the required experience.

A master's degree in civil engineering, construction management, architecture, or directly related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of appointment:

- Project Management Institute (PMI)
- Project Management Certification
- Project Management Professional (PMP)
- Certified Construction Management (CCM)
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion and maintenance of a background investigation or security clearance to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.

May be required to function in one or more of the following: uneven terrain, construction sites, inclement weather, heavily populated clinic or program settings with ill or highly emotional clientele.



CAPITAL PROJECTS MANAGER

Bargaining Unit: MA Administrative Management

Class Code:
8182MA

COUNTY OF ORANGE

Established Date: March 10,
2023

Revision Date: October 3,
2025

DEFINITION:

This class is the second in a four-level **Capital Project Management Series** responsible for supervising and overseeing a unit involved in the project and program planning and management of vertical and horizontal infrastructure (i.e., roads, bridges, sidewalks, harbors, beaches, trails, flood control facilities, public buildings, landfills, airport) and major maintenance projects. Work includes oversight of work product including adherence to design standards and regulations, strategic planning for project scheduling, budgeting, and leadership of staff.

The Capital Project Management series includes the following:

Capital Projects Administrator (8181MA)
Capital Projects Manager (8182MA)
Capital Projects Manager, Senior (8183MA)
Capital Projects Assistant Deputy Director (8184MA)

CLASS CHARACTERISTICS:

Incumbents supervise construction projects/programs of varying sizes or smaller work units typically with supervisory authority over multiple exempt or management-level staff. Decision-making includes using discretion for program decisions to achieve management objectives, with accompanying accountability for those decisions. An individual contributor who is a designated subject matter expert and who serves as a manager of a Countywide enterprise or highly technical and specialized function, without direct supervisory responsibilities may be assigned to this level.

As assigned, an incumbent supervises management and non-management level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Plans, coordinates, and evaluates capital infrastructure and maintenance programs and/or projects; develops short and long term strategies; identifies and prioritizes initiatives based upon organizational priorities; may serve as a decision maker for project financial and scope related issues; prepares and administers ongoing daily operations to comply with strategic goals, project schedules, and preferred outcomes; manages program planning and resource deployment; and ensures compliance with all policies, procedures, quality, and performance standards.
2. Researches, analyzes, develops, and reviews original reports, materials, presentations, and other documents; and develops and makes recommendations to higher-level staff and other stakeholders.
3. Supervises professional, paraprofessional, and support level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
4. Establishes internal and external partnerships; coordinates with internal staff/agencies, vendors, the general public, and/or external agencies; serves as a liaison across internal departments/agencies; and convenes, facilitates, and/or attends meetings.
5. Manages project and program administrative, procedural, programmatic and contractual needs, such as governance, tools and templates, which ensure a continuous process of monitoring and analyzing schedule and cost, and reporting on project and/or program progress, status and performance.
6. Manages procurement and budget for assigned program(s); monitors and approves inventory and procurement processes; prepares forecasts; prepares and reviews budget requests; research and reviews funding opportunities; collects and analyzes financial information; and makes budgetary and financial recommendations to higher-level staff.
7. Ensures compliance with safety procedures and related practices, policies, regulations, and laws.
8. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:**Knowledge of**

- Principles and practices of managing capital construction and maintenance programs
- Principles and practices of project management, construction management, program planning, project scheduling, cost management, and/or estimating
- Principles and practices of modern business management
- Principles and practices of forecasting, budgeting, and fiscal management
- Principles and practices of resource planning and allocation

- Principles and practices of service delivery models
- Project and contract management principles
- Principles of various project delivery methods, including design-bid-build, design+CMAR, and design-build
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Best practices, trends and emerging technologies
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, and regulations
- Principles in providing exceptional customer service
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Manage and implement assigned capital improvement programs and/or projects
- Oversee adherence to quality assurance and standards
- Interpret, monitor, and report financial information and statistics
- Research industry trends, solutions, and best practices
- Schedule multiple concurrent and interrelated projects
- Evaluate, assess, manage and document, change order requests
- Compile and analyze data, formulate issues, and articulate recommendations
- Author and prepare original reports, content, documents, and presentations
- Recommend, develop, and implement policies and procedures

- Manage and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Facilitate groups and building consensus using persuasive reasoning
- Exercise political acumen, tact, and diplomacy
- Interpret and apply applicable laws, codes, regulations, and standards
- Provide exceptional customer service
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction
- Foster an organizational culture that supports County/Department's mission, vision and values, accountability and safety

Education and Experience

One (1) year of experience as a Capital Projects Administrator or its equivalent with the County of Orange.

Or

Five (5) years of professional engineering and or construction project management experience in work related to assignment such as managing long-range programs or large-scale infrastructure projects such as road, bridge, flood control facilities, bikeways, public buildings, landfills, and airport from the inception phase through the close-out phase; must include one (1) year of lead/ supervisory experience.

A bachelor's degree in civil engineering, construction management, architecture, or related field of study may substitute for one (1) year of the required experience.

A master's degree in civil engineering, construction management, architecture, or directly related field of study may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of appointment:

- Project Management Institute (PMI)
- Project Management Certification
- Project Management Professional (PMP)
- Certified Construction Management (CCM)
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion and maintenance of a background investigation or security clearance to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.

May be required to function in one or more of the following: uneven terrain, construction sites, inclement weather, heavily populated clinic or program settings with ill or highly emotional clientele.



CAPITAL PROJECTS MANAGER, SENIOR

Bargaining Unit: MA Administrative Management

Class Code:
8183MA

COUNTY OF ORANGE
Established Date: March 10,
2023
Revision Date: October 3,
2025

DEFINITION:

This class is the third in a four-level **Capital Project Management Series** responsible for managing a major section or unit involved in the construction of vertical and horizontal infrastructure projects (i.e., roads, bridges, sidewalks, harbors, beaches, trails, flood control facilities, public buildings, landfills, airport); major maintenance and repair projects; building tenant improvements; and facility and parks master-planning.

The Capital Project Management series includes the following:

Capital Projects Administrator (8181MA)
Capital Projects Manager (8182MA)
Capital Projects Manager, Senior (8183MA)
Capital Projects Assistant Deputy Director (8184MA)

CLASS CHARACTERISTICS:

Incumbents oversee multiple highly complex capital project management operational functions and/or an organizational work unit exercising first-level (direct) supervision to multiple exempt or management level employees, indirect supervision to additional management and/or non-management level employees and have responsibility for significant budget/funding levels. Decision-making includes establishing work unit objectives and goals, exercising considerable discretion in selecting the method to address a problem or issue, and fostering collaboration among and between the work units supervised as well with work units under the direction of others.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Provides operational and technical management and direction to staff including, but not limited, to one or more of the following areas: construction capital improvements, maintenance, tenant improvements, architecture, infrastructure design, various engineering disciplines, construction, land use, and site planning.
2. Troubleshoots and resolves program or work unit issues and keeps higher-level management informed of issues/resolution.
3. Develops, implements, and evaluates services and programs to ensure compliance with strategies and performance goals; determines appropriate project delivery methods; performs value engineering to optimize costs; manages work systems and processes; maintains and updates procedures, and ensures compliance; researches trends and best practices; and recommends and implements changes.
4. Develops and administers work unit budgets and procurement processes; reviews and approves budget requests and transactions; negotiates and manages contracts; researches and analyzes financial information; makes resource management, prioritization, and allocation recommendations; and implements resource allocation decisions and assignments.
5. Oversees the preparation of and/or prepares, reviews, designs, and/or maintains reports, land use entitlement reviews, permits, records, plans, and other documents; oversees the research and analysis of policy and related information; and makes recommendations to higher-level staff.
6. Oversees and conducts performance evaluations, employee development, hiring, discipline, and termination procedures as well as directly supervises management, professional, paraprofessional, and support staff, as assigned.
7. Coordinates with the general public, internal staff/agencies, and/or external agencies; convenes, facilitates and attends meetings; and prepares and makes presentations to the public, elected officials, appointment boards, and other stakeholders to promote a uniform and comprehensive approach to planning, design and construction.
8. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:

Knowledge of

- Principles and practices of capital construction project and program management
- Principles and practices of modern business management
- Principles and practices of budgeting and fiscal management
- Principles and practices of program planning and administration
- Principles and practices of service and construction delivery models
- Principles of various project delivery methods, including design-bid-build, design+CMAR, and design-build

- Principles and practices of strategic planning and performance measurement
- Principles and practices of group facilitation and building consensus
- Principles and practices of modern procurement contract negotiation and administration
- Best practices, trends, and emerging technologies
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, and regulations
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles in providing exceptional customer service
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Manage the operations of capital construction project services and programs
- Manage large-scale complex construction infrastructure projects and/or initiatives, enterprise projects, and/or oversee the management of multiple projects simultaneously
- Ensure ongoing compliance with strategic objectives and measuring performance, participating in the development of goals and strategic objectives
- Manage budgets and allocation of resources
- Interpret, monitor, and report financial information and statistics
- Monitor and execute procurement activities for assigned work unit; and negotiate and administer contracts
- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Research, recommend, and implement industry trends, solutions, and best practices
- Author and oversee the preparation of original reports, content, documents, and presentations

- Make presentations to stakeholders, elected officials, and County leadership
- Develop and implement policies and procedures
- Facilitate group discussions and build consensus using persuasive reasoning
- Exercise political acumen, tact, and diplomacy
- Collaborate with program stakeholders, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Manage and evaluate staff performance, training, coaching, coordinate deadlines, prioritize work demands, and assign/monitor work
- Provide exceptional customer service and resolve escalated issues
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year experience as a Capital Projects Manager or two years as a Capital Projects Administrator or its equivalent with the County of Orange.

Or

Five (5) years of professional engineering and/or construction project management experience in work related to assignment such as managing long-range programs or large-scale infrastructure projects such as road, bridge, flood control facilities, bikeways, public buildings, landfills and airport from the inception phase through the close-out phase; must include two (2) years of lead/supervisory experience.

A bachelor's degree in civil engineering, construction management, architecture, or related field may substitute for one (1) year of the required experience.

A master's degree in civil engineering, construction management, architecture, or directly related field of study may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of appointment:

- Project Management Institute (PMI)
- Project Management Certification
- Project Management Professional (PMP)

- Certified Construction Management (CCM)
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion and maintenance of a background investigation or security clearance to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.

May be required to function in one or more of the following: uneven terrain, construction sites, inclement weather, heavily populated clinic or program settings with ill or highly emotional clientele.



COUNTY OF ORANGE

Established Date: October 3, 2025

CAPITAL PROJECTS ASSISTANT DEPUTY DIRECTOR

Bargaining Unit: MA Administrative Management

Class Code:
8184MA

DEFINITION:

This class is the fourth in a four-level **Capital Project Management Series** responsible for overseeing and managing a departmental capital projects division, comprised of multiple sections or units, involved in the construction of vertical and horizontal infrastructure projects (i.e., roads, bridges, sidewalks, harbors, beaches, trails, flood control facilities, public buildings, landfills, airport); major maintenance and building tenant improvements including facility master-planning; and parks master-planning.

The Capital Project Management series includes the following:

Capital Projects Administrator (8181MA)
Capital Projects Manager (8182MA)
Capital Projects Manager, Senior (8183MA)
Capital Projects Assistant Deputy Director (8184MA)

CLASS CHARACTERISTICS:

Incumbents serve as a technical consultant to senior and/or executive management on the most complex capital projects and provides supervision to multiple exempt and management level employees, indirect supervision to additional management, and/or non-management level employees. Incumbents prepare and execute multiple sections' operating budget and resource management policies and procedures or directs the development of capital projects of various sizes and complexities through subordinate supervisors. Incumbents are distinguished from the lower-level capital project managers by their responsibility for serving as first assistant to a division head. Positions at this level demonstrate a comprehensive knowledge of the department. Incumbents exercise wide discretion and are directly responsible for the planning and execution of project management functions which have significant long range economic and politically sensitive consequences. Incumbents must possess the ability to exercise the principles of management in the direction of an organizational section for the division.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Oversees the management of operational and technical staff through subordinates and provides direction including, but not limited, to one or more of the following areas: construction capital improvements, maintenance, tenant improvements, architecture, various engineering disciplines, construction, land use, and site planning.
2. Provides consultations on escalated and complex capital projects issues and complaints, and keeps higher-level management informed of issues/resolution.
3. Develops, implements, and evaluates services and programs to ensure compliance with strategies and performance goals; determines appropriate project delivery methods; performs value engineering to optimize costs; manages work systems and processes; maintains and updates procedures, and ensures compliance; researches trends and best practices; and recommends and implements changes.
4. Assists the Division Director, user departments, and other client agencies in developing and implementing long term facilities acquisition programs, including master planning and programming, facilities studies and programming, design and construction activities, scheduling, monitoring and reporting, and in the development of annual capital project budget proposals for approval by the Board of Supervisors.
5. Develops and administers work unit budgets and procurement processes; reviews and approves budget requests and transactions; negotiates and manages contracts; researches and analyzes financial information; makes resource management, prioritization, and allocation recommendations; and implements resource allocation decisions and assignments.
6. Oversees the preparation of and/or prepares, reviews, designs, and/or maintains reports, land use entitlement reviews; permits, records, plans, and other documents; oversees the research and analysis of policy and related information; and makes recommendations to higher-level staff.
7. Oversees and conducts performance evaluations, employee development, hiring, discipline, and termination procedures as well as directly supervises management, professional, paraprofessional, and support staff, as assigned.
8. Oversees the contract management of A/E consultants, construction contractors, maintenance vendors through all aspects of vendor utilization through all stated of the contract lifecycle, to ensure that vendors are appropriately effectively utilized to fulfill project scope, ensure projects are appropriately scoped, ensure quality project delivery, within timelines, and budgets. Oversees the management of change orders. Partners with county procurement, accounting, budget and other stakeholders.
9. Coordinates with county officials and staff, vendors, the public, community organizations, and/or external agencies; develops internal and external partnerships; and responds to escalated requests and operational issues. Serves as a department liaison and provides information and guidance to departments, the public, department representatives, and vendors.
10. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:**Knowledge of**

- Principles and practices of capital project and program management
- Principles and practices of modern business management
- Principles and practices of budgeting and fiscal management
- Principles and practices of program planning and administration
- Principles and practices of service delivery models
- Principles and practices of strategic planning and performance measurement
- Principles and practices of group facilitation and building consensus
- Principles and practices of modern procurement contract negotiation and administration
- Principles of various project delivery methods, including design-bid-build, design+CMAR, and design-build
- Best practices, trends, and emerging technologies
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, and regulations
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles in providing exceptional customer service
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Manage the operations of capital project services and programs
- Manage large-scale complex projects and/or initiatives, enterprise projects, and/or oversee the management of multiple projects simultaneously

- Ensure ongoing compliance with strategic objectives and measuring performance; participate in the development of goals and strategic objectives
- Manage budgets and allocating resources
- Interpret, monitor, and report financial information and statistics
- Monitor and execute procurement activities for assigned work unit; and negotiate and administer contracts
- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Research, recommend, and implement industry trends, solutions, and best practices
- Author and oversee the preparation of original reports, content, documents, and presentations
- Present to stakeholders, elected officials, and county leadership
- Develop and implement policies and procedures
- Facilitate group discussions and build consensus using persuasive reasoning
- Exercise political acumen, tact, and diplomacy
- Collaborate with program stakeholders, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Manage and evaluate staff performance, train, coach, coordinate deadlines, prioritize work demands, and assign/monitor work
- Provide exceptional customer service and resolve escalated issues
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction
- Model and uphold ethical standards that ensure regulatory compliance, demonstrate integrity, recognize, avoid and/or mitigate potential conflicts of interest, and ensure the County's interests are appropriately represented with stakeholders
- Foster an organizational culture that supports County/Department's mission, vision and values, accountability and safety

Education and Experience

One (1) year of experience as a Capital Projects Manager, Senior or two (2) years of experience as a Capital Projects Manager or its equivalent with the County of Orange.

Or

Six (6) years of professional engineering and/or construction management experience in work related to assignment such as managing long-range programs or large-scale infrastructure projects such as road, bridge, flood control facilities, bikeways, public buildings, landfills, and airport from the inception phase through the close-out phase; must include three (3) years of lead/supervisory experience.

A bachelor's degree in civil engineering, construction management, architecture, or related field may substitute for one (1) year of the required experience.

A master's degree in civil engineering, construction management, architecture, or directly related field of study may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of appointment:

- Project Management Institute (PMI)
- Project Management Certification
- Project Management Professional (PMP)
- Certified Construction Manager (CCM)
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion and maintenance of a background investigation or security clearance to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.

May be required to function in one or more of the following: uneven terrain, construction sites, inclement weather, heavily populated clinic or program settings with ill or highly emotional clientele.



FLEET TECHNICIAN I

Bargaining Unit: OS Operations and Service
Maintenance

Class Code:
3300OS

COUNTY OF ORANGE

Established Date: February 7, 2017

Revision Date: October 3, 2025

DEFINITION:

Under immediate supervision, services, inspects and performs preventative maintenance and semi-skilled repairs to a variety of light-duty vehicles, including, but not limited to, automobiles, light-duty trucks, police vehicles and other various forms of equipment; maintains, services and repairs engines on small equipment; operates a variety of hand, power and shop tools; assists journey-level technicians; and performs other work as required.

The Fleet Technician series includes the following:

Fleet Technician I (3300OS)

Fleet Technician II (3301OS)

Fleet Technician III (3302OS)

Supervising Fleet Technician (3303SM)

CLASS CHARACTERISTICS:

The Fleet Technician I classification is the entry level classification in the series. The incumbents perform a range of minor service functions involving mechanical and basic electrical components. Incumbents will progressively learn to use more specialized diagnostic equipment and begin to independently work on their assignments.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Troubleshoots and diagnoses vehicles and equipment, including vehicle computers and component problems.
2. Performs preventative maintenance on light-duty vehicles, including lubrication and oil changes, transmission, wheel balancing and hose replacements.
3. Performs minor repairs on automatic and standard transmissions, clutch and brake systems, alternator and starter systems, differentials, pumps, electrical systems, steering systems, air conditioning systems, and other components of automobiles and light duty vehicles.

4. Performs compression tests; repairs standard, electronic, and computerized ignition systems; and adjusts timing and valves.
5. Performs new vehicle preparation and decommissioning.
6. May perform emergency road service repairs.

MINIMUM QUALIFICATIONS:

Basic Knowledge of

- Techniques and methods of repairing automotive and related components, including engines, transmissions, carburetors, electrical systems, differentials, air conditioning and emission control systems, and fuel injection systems
- Theory, care, and operation of gasoline, fuel vehicle engines, and/or electrical and mechanical components for the maintenance and repair of automobiles, light trucks, and/or other mechanical equipment
- Methods, materials, tools, and equipment of the trade and their use in the maintenance and repair of automotive and/or other mechanical equipment
- Preventive maintenance inspection methods

Ability to

- Diagnose and repair automotive and light truck powered equipment, and/or related components under close supervision
- Prepare simple records such as parts requisition forms and work orders; logs completed work in individual vehicle folders
- Reads, understands, and follows oral instructions and written directives such as factory service bulletins, automotive and light truck manuals, and memorandums
- Work in a team environment and assist other team members as needed
- Learn how to use fleet management software
- Carry out work in accordance with all applicable codes, regulations, and guidelines pertaining to vehicle safety and proper operation of the vehicle/equipment, including, but not limited to, Federal Motor Vehicle Safety Standard, Federal Consumer Product Safety Commission Regulation, California Code of Regulations Title 13 California Highway Patrol, and Occupational Safety and Health Administration

Education and Experience

One (1) year of technical experience which demonstrates possession of the required knowledge and abilities listed above.

Certificate of completion of automotive mechanic instruction from an adult school, vocational school, or specialized industrial program.

License/Certification

A valid California Class C Driver's License by date of appointment.

Special Requirements

Incumbents are expected to provide their own hand tools.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***Physical and Mental Requirements***

Positions in this class typically require: body mobility to stand, stoop, kneel, crouch, squat, push, pull, or crawl; ability to move distances within and between warehouses, offices, and field locations; lift or move up to 50 pounds occasionally, and/or up to 25 pounds of force constantly to move objects; climb stairs and ladders, and work, traverse, and balance atop of the stairs; ability to mount and dismount forklift and/or truck; vision efficient to read up close and at distances over 20 feet, and distinguish colors to identify road signs and signals, read color wire schematics, identify correct ordered parts, and properly identify wire harness color coding; ability to detect, distinguish, and determine odors; requires the ability to speak and hear well enough to communicate clearly and understandably in person to individuals and groups; possess manual dexterity sufficient to use hands, arms, and shoulders repetitively and without limitation to range and motion to operate keyboards, tools, and specialized equipment; ability to drive work vehicles on uneven roads.

Environmental and Working Conditions

Position assignments include outdoor and indoor field, yards, office settings, and shop locations. Work location shops and field conditions are subject to varying weather conditions, heat variance from an open-air workshop and field service locations, and uneven terrain due to equipment location. Incumbents may be exposed to dust and chemicals from equipment being maintained, including paint line stripper, vegetation spray rigs, exhaust fumes from running equipment, gases, and fluids. May be exposed to intense noise levels from the shop, machinery, and equipment. May be required to wear safety equipment, including safety shoes and boots, glasses and face shields, ear plugs and muffs, protective gloves, and rain attire.



FLEET TECHNICIAN II

Bargaining Unit: OS Operations and Service
Maintenance

Class Code:
3301OS

COUNTY OF ORANGE

Established Date: February 7, 2017

Revision Date: October 3, 2025

DEFINITION:

Under general supervision, overhauls and repairs a wide variety of gasoline, electric, diesel, and natural gas-powered heavy, medium, and light duty vehicles including, but not limited to, automobiles, trucks, police vehicles, and other various forms of equipment; repairs, modifies, and paints a wide variety of vehicles and heavy equipment exteriors and interiors; operates gas and electric welding equipment to fabricate, modify, and repair a wide variety of metal articles; and performs other work as required.

The Fleet Technician series includes the following:

Fleet Technician I (3300OS)

Fleet Technician II (3301OS)

Fleet Technician III (3302OS)

Supervising Fleet Technician (3303SM)

CLASS CHARACTERISTICS:

The Fleet Technician II classification is the journey level class in the series, and typically reports to a Supervising Fleet Technician. Depending on area of assignment, positions are responsible for diagnosing and repairing mechanical, electrical, and other operating defects in automobiles and gasoline and diesel powered trucks; diagnosing and repairing mechanical, electrical, hydraulic, and operating defects in gasoline and diesel powered heavy construction equipment; repairing, modifying, and painting automobiles and heavy equipment exteriors and interiors; installing or equipping public-safety vehicles with emergency equipment; and/or performing specialized duties involving welding and fabrication related to mobile vehicle and equipment repair and maintenance, hydraulic systems, fuel tanks, and fuel systems parts.

This classification is distinguished from the Fleet Technician I by the additional training, higher degree of responsibility, and knowledge that is required of a Fleet Technician II to overhaul and repair such fleet equipment independently.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

Automotive Mechanic

1. Diagnoses vehicle component problems.
2. Overhauls and repairs engines, automatic and standard transmissions, clutch and brake systems, alternator and starter systems, differentials, pumps, electrical systems, steering systems, and other major components of automobiles and light trucks.
3. Diagnoses, repairs, and maintains electric vehicle (EV) systems including high-voltage battery packs, electric drive motors, regenerative braking systems, power inverters, onboard charging systems, and advanced electronic control systems and other major components of electric vehicles.
4. Tunes up engines, takes compression tests, adjusts timing and valves, and repairs standard, electronic, and computerized ignition systems; adjusts, overhauls, or replaces fuel systems and components; replaces or adjusts emission control systems.
5. Repairs, vacuums, and recharges Heating, Ventilation, and Air Conditioning systems.
6. Performs front-end alignment and wheel balancing; repairs or replaces exhaust systems, ignition and door locks, window vents and regulators, dash gauges, and trunk and glove compartment components; installs special equipment such as extra lights, light bars, sirens, audio communications systems, emergency warning systems and related components.
7. Prepares parts requisitions, work time and material records.
8. Utilizes computerized fleet management software to document, track, and update work orders.
9. May drive a tow truck and service disabled vehicles.

Heavy Duty Equipment Mechanic

10. Examines and locates mechanical defects in a wide variety of road and construction equipment, including diesel, gasoline and alternative fuel powered trucks, tractors, motor graders and power shovels.
11. Makes major and minor mechanical repairs; disassembles, repairs, or replaces work parts; fits new parts and adjusts engine's oil, water and fuel pumps, fuel systems, governors, starting motors, clutches, transmissions, differentials, brakes, power trains, exhaust control devices, air brakes and steering gear.
12. Repairs track layer tractors and checks and replaces rollers, pins, and bushings.
13. Times and adjusts gasoline and diesel engines, and replaces electrical wiring.
14. Overhauls hydraulic systems and steering assemblies on motor graders and tractors.
15. Prepares time and material records; researches and contacts vendors for parts and/or specialized tools.
16. Utilizes computerized fleet management software to document, track, and update work orders

17. Performs acetylene and electric welding.

18. May be required to make repairs in the field, during the night, and deliver vehicles to work sites

Body and Paint Mechanic

1. Straightens and repairs automobile and heavy equipment fenders, body panels, and metal surfaces; removes dents and welds tears in surfaces; fills rough areas, and grinds and sands surfaces; repairs and fabricates fiberglass and various metals parts and surfaces.
2. Sands and prime coats exterior and interior automobile and heavy equipment surfaces in preparation for finish painting.
3. Mixes, matches and applies paint with spray gun.
4. Builds, repairs, or replaces wood side boards and stakes on truck beds.
5. Disassembles and reassembles specialized equipment such as sirens, lights, mounts, and brackets and makes necessary wiring installations.
6. Repairs or replaces door hinges, locks, glass run channels, windows, windshields and various parts.
7. Repairs and replaces interior trim and upholstery.
8. Uses various welding methods to modify and repair damaged vehicles and equipment.
9. Installs basic automotive wiring systems.
10. Fabricates from sheet metal modifications to vehicles and heavy equipment to alter original configurations.
11. Utilizes computerized fleet management software to document, track, and update work orders.

Fleet Fabricator

1. Fabricates parts for, makes alterations to, and repairs fleet equipment and vehicles in the shop and field through the use of shop and portable welding equipment.
2. Examines damaged equipment and metal articles, determines course of action, and takes equipment apart if necessary to repair parts and restore to service.
3. Installs, repairs, and modifies blades on bulldozers, motor graders, and skip loaders.
4. Welds broken truck frames after removing bed, wheels, rear end assembly, springs, fuel tanks, hydraulic rams, hydraulic oil reservoir, and electric wiring and lights; reassembles following frame repairs.
5. Estimates time and materials needed to perform jobs and maintains record of time and materials used for billing purposes; assists in annual inventory.
6. Designs, installs, modifies, and repairs high pressure pump and hydraulic systems.

MINIMUM QUALIFICATIONS:**Automotive and Heavy Duty Equipment Mechanic****General Knowledge of**

- Techniques and methods of overhauling and repairing automotive and/or heavy gasoline, alternative fuel, electric, and diesel powered equipment and related components including engines, transmissions, electrical systems, battery packs, differentials, air conditioning and emission control systems equipment
- Theory, care, and operation of gasoline, electric and diesel powered vehicle engines, diesel powered internal combustion engines, and/or electrical and mechanical components for the maintenance and repair of automobiles, light trucks, heavy equipment, and/or other mechanical equipment
- Methods, materials, tools, and equipment of the trade and their use in the maintenance and repair of automotive, heavy equipment, and/or other mechanical equipment
- Preventive maintenance inspection methods

Ability to

- Diagnose mechanical and electrical problems and determine appropriate maintenance work
- Repair and overhaul automotive, light truck equipment, heavy gasoline and diesel powered equipment, and/or related components under general supervision
- Perform light duty arc and oxyacetylene welding tasks
- Prepare simple records such as parts requisition forms and work orders, and logs completed work in individual vehicle folders
- Use computerized fleet management software to enter and track maintenance and repair information
- Read, understand, and follow oral instructions and written directives such as factory service bulletins, automotive, light truck, and/or heavy construction equipment manuals and memorandums
- Operate computer diagnostic software and scanning tools
- Carry out work in accordance with all applicable codes, regulations, and guidelines pertaining to vehicle safety and proper operation of the vehicle/equipment including, but not limited to, Federal Motor Vehicle Safety Standard (FMVSS), Federal Consumer Product Safety Commission Regulation, California Code of Regulations Title 13 California Highway Patrol, and Occupational Safety and Health Administration

Knowledge of

- Techniques and methods of overhauling and repairing automotive and/or heavy gasoline, alternative fuel, and diesel powered equipment and related components including engines, transmissions, electrical systems, differentials, air conditioning and emission control systems equipment
- Theory, care, and operation of gasoline and diesel powered vehicle engines, diesel powered internal combustion engines, and/or electrical and mechanical components for the maintenance and repair of automobiles, light trucks, heavy equipment, and/or other mechanical equipment
- Methods, materials, tools, and equipment of the trade and their use in the maintenance and repair of automotive, heavy equipment, and/or other mechanical equipment
- Preventive maintenance inspection methods

Ability to

- Perform body and fender work at the journey level to include repairing, modifying, and painting automobiles, trucks, and other equipment
- Set up and operate various welding equipment in order to accomplish precision welding on various types of metals which are characteristic of automobile/equipment repair work
- Work independently from written and oral instructions, diagrams, schematics, sketches, specifications, and rough drafts
- Use various manuals to look up and record information on replacement materials required in body and fender repair work
- Make itemized repair estimates by identifying the cost and parts necessary to repair damaged equipment
- Use computerized fleet management software to enter and track maintenance and repair information

Fleet Fabricator

Knowledge of

- Manufacturing practices relative to design, materials, strength, quality, durability, safety, and workmanship
- Codes, standards, and practices in the industry

Ability to

- Perform multiple welding processes such as: arc welding (SMAW), metal insert tungsten inert gas (MIG) welding, tungsten inert gas (TIG) welding, flux-core welding (FCAW), plastic welding hard facing, oxygen/acetylene welding, and brazing
- Work with various types of metals, based on application, including mild steel, pipe, high carbon steel aluminum, stainless steel, brass, and plastic
- Interpret welding symbols and complete welding tasks as per blueprint specifications
- Develop time and material estimates for custom fabrication, new vehicle up-fitting, and modifications to County equipment as required
- Use independent judgment in selecting the repair methods, equipment, and materials used to accomplish assignments
- Operate a wide variety of County equipment to be able to complete repairs

Education and Experience

One (1) year as a Fleet Technician I with the County of Orange.

Or

Three (3) years of journey level technical experience which demonstrates possession of the required knowledge and abilities referenced above.

Education or training that can be directly related to the knowledge and ability requirements may be substituted for up to one (1) year of journey level technical experience at the rate of three (3) semester units for one (1) month of experience and one hour of job related training for one (1) hour of experience.

License/Certification

A valid California Class C Driver's License by date of appointment. (Class "A" or "B" may be required for some assignments).

Special Requirements

Incumbents are expected to provide their own hand tools.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Positions in this class typically require: body mobility to stand, stoop, kneel, crouch, squat, push, pull, or crawl; ability to move distances within and between warehouses, offices, and field locations; lift or move up to 50 pounds occasionally, and/or up to 25 pounds of force constantly to move objects; climb stairs and ladders, and work, traverse, and balance atop of the stairs; ability to mount and dismount forklift and/or truck; vision efficient to read up close and at distances over 20 feet, and distinguish colors to identify road signs and signals, read

color wire schematics, identify correct ordered parts, and properly identify wire harness color coding; ability to detect, distinguish, and determine odors; requires the ability to speak and hear well enough to communicate clearly and understandably in person to individuals and groups; possess manual dexterity sufficient to use hands, arms, and shoulders repetitively and without limitation to range and motion to operate keyboards, tools, and specialized equipment; ability to drive work vehicles on uneven roads.

Environmental and Working Conditions

Position assignments include outdoor and indoor field, yards, office settings, and shop locations. Work location shops and field conditions are subject to varying weather conditions, heat variance from an open air work shop and field service locations, and uneven terrain due to equipment location. Incumbents may be exposed to dust and chemicals from equipment being maintained, including paint line stripper, vegetation spray rigs, exhaust fumes from running equipment, gases, and fluids. May be exposed to intense noise levels from the shop, machinery, and equipment. May be required to wear safety equipment, including safety shoes and boots, glasses and face shields, ear plugs and muffs, protective gloves, and rain attire.



FLEET TECHNICIAN III

Bargaining Unit: OS Operations and Service
Maintenance

Class Code:
3302OS

COUNTY OF ORANGE

Established Date: February 7, 2017

Revision Date: October 3, 2025

DEFINITION:

Under minimal supervision, acts in lead capacity providing technical support and training to lower level Fleet Technicians; performs the highly skilled and more complex level of work related to specialized maintenance and repairs of vehicles, heavy construction, and specialized equipment; and performs other work as required.

The Fleet Technician series includes the following:

Fleet Technician I (3300OS)

Fleet Technician II (3301OS)

Fleet Technician III (3302OS)

Supervising Fleet Technician (3303SM)

CLASS CHARACTERISTICS:

The Fleet Technician III classification is the advance journey level class in the series and reports to a Supervising Fleet Technician. This classification is distinguished from the Fleet Technician II by application of more advanced knowledge and experience in the complex and highly specialized technical diagnostics and repair of vehicles, heavy construction equipment, and/or trucks powered by gasoline, alternative fuels, or diesel fuels. In addition, this position provides technical training and consultation to lower level fleet technicians.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Diagnoses and repairs, both independently and/or in a lead capacity overseeing lower level fleet technicians, on the more complex and highly skilled assignments, including but not limited to, field service repairs, bus repairs, generator repairs, compressed natural gas vehicles, electric and hybrid vehicles, emission systems diagnostic/repair, and computerized vehicle control systems.
2. Makes inspections of emergency requests in the field and determines the nature of equipment failures, extensiveness of repairs, tools, and material needed to accomplish repairs and the feasibility of effecting repairs on site.

3. May be required to perform the more complex repairs in shop, in the field, and variety of emergency call outs.
4. Assists supervisors in reviewing work priorities, technical problems, and estimating and planning repair jobs.
5. Researches and orders necessary parts and material to perform maintenance and repair of equipment.
6. Advises heavy equipment operators regarding unique mechanical capabilities of equipment and operating techniques that could reduce the frequency of repair.
7. Utilizes computerized fleet management software to create, document, track, update, and close out work orders.
8. May supervise in the absence of the supervisor.

MINIMUM QUALIFICATIONS:

Knowledge of

- Techniques and methods of overhauling and repairing heavy, alternative, and diesel powered equipment, and related components including engines, fuel systems, electrical systems, and transmissions
- Theory, care, and operation of gasoline, electric, and diesel powered internal combustion engines and mechanical components for the maintenance and repair of heavy and other mechanical equipment
- Methods, materials, tools, and equipment of the trade and their use in the maintenance and repair of heavy and other mechanical equipment
- Preventive maintenance inspection methods

Ability to

- Diagnose mechanical troubles and determine appropriate maintenance work; repair and overhaul heavy alternative, gasoline, electric, and diesel powered equipment and related components with minimum supervision
- Prepare and maintain records of work orders, work completed, parts and materials used
- Read and interpret factory service bulletins, equipment manuals and memorandums
- Carry out work in accordance with all applicable codes, regulations and guidelines pertaining to vehicle safety and proper operation of the vehicle/equipment including, but not limited to, Federal Motor Vehicle Safety Standard (FMVSS), Federal Consumer Product Safety Commission Regulation, California Code of Regulations Title 13 California Highway Patrol, and Occupational Safety and Health Administration

Education and Experience

Three (3) years as a Fleet Technician II with the County of Orange.

Or

Six (6) years of journey level technical experience which demonstrates possession of the required knowledge and abilities listed above at the journey level.

Education or training that can be directly related to the knowledge and ability requirements may be substituted for up to one (1) year of journey level technical experience at the rate of three (3) semester units for one (1) month of experience and one (1) hour of job related training for one (1) hour of experience.

License/Certification

A valid California Class C Driver's License by date of appointment. (Class "A" or "B" may be required for some assignments).

At least (4) Automotive Service Excellence certifications in the area of Automotive (A series) or Medium/Heavy Truck (T series).

Special Requirements

Incumbents are expected to provide their own hand tools.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***Physical and Mental Requirements***

Positions in this class typically require: body mobility to stand, stoop, kneel, crouch, squat, push, pull, or crawl; ability to move distances within and between warehouses, offices, and field locations; lift or move up to 50 pounds occasionally, and/or up to 25 pounds of force constantly to move objects; climb stairs and ladders, and work, traverse, and balance atop of the stairs; ability to mount and dismount forklift and/or truck; vision efficient to read up close and at distances over 20 feet, and distinguish colors to identify road signs and signals, read color wire schematics, identify correct ordered parts, and properly identify wire harness color coding; ability to detect, distinguish, and determine odors; requires the ability to speak and hear well enough to communicate clearly and understandably in person to individuals and groups; possess manual dexterity sufficient to use hands, arms, and shoulders repetitively and without limitation to range and motion to operate keyboards, tools, and specialized equipment; ability to drive work vehicles on uneven roads.

Environmental and Working Conditions

Position assignments include outdoor and indoor field, yards, office settings, and shop locations. Work location shops and field conditions are subject to varying weather conditions, heat variance from an open air work shop and field service locations, and uneven terrain due to equipment location. Incumbents may be exposed to dust and chemicals from equipment being maintained, including paint line stripper, vegetation spray rigs, exhaust fumes from running equipment, gases, and fluids. May be exposed to intense noise levels from the shop, machinery, and equipment. May be required to wear safety equipment, including safety shoes and boots, glasses and face shields, ear plugs and muffs, protective gloves, and rain attire.



SUPERVISING FLEET TECHNICIAN

Bargaining Unit: SM Supervisory Management

Class Code:
3303SM

COUNTY OF ORANGE

Established Date: February 7, 2017

Revision Date: October 3, 2025

DEFINITION:

Under general supervision, assigns, supervises and coordinates the work of fleet technicians and other related trade classes engaged in repairing, modifying and overhauling passenger vehicles, light trucks, heavy construction equipment, and trucks powered by gasoline, battery, alternative, or diesel fuels; and performs other work as required.

The Fleet Technician series includes the following:

Fleet Technician I (3300OS)

Fleet Technician II (3301OS)

Fleet Technician III (3302OS)

Supervising Fleet Technician (3303SM)

CLASS CHARACTERISTICS:

The Supervising Fleet Technician classification is the first-line level supervisor in the series. Positions in this class may be assigned to be in charge of a small departmental equipment maintenance and repair shop or supervise a section of a larger centralized transportation maintenance, body/paint, and repair shop under the supervision of a Fleet Manager.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Assigns, supervises, trains and evaluates the work of Fleet Technicians and other related classes in repairing vehicle engines, clutches, transmissions, brakes, front and rear axles, fuel, cooling and electrical systems, light equipment and other components of automobiles, trucks, and construction equipment; may supervise the work of Fleet Technicians in modifying and painting automobiles, heavy equipment, truck exteriors and interiors and a variety of non-automotive power equipment; may design and oversee custom builds for emergency and law enforcement vehicles; prepares or reviews performance evaluations and other documentation relative to employee performance.

2. Inspects incoming equipment and diagnoses damage or cause of malfunction; estimates cost and arranges for necessary repairs; refers decisions on work requiring extensive repairs to the supervisor.
3. Orders necessary parts and materials to perform modification and/or repair of equipment; checks work in progress and completed for technical adequacy and compliance with equipment specifications.
4. Utilizes computerized fleet management software to maintain and update fleet maintenance records, service logs, work orders, and compliance reports.
5. Examines and approves completed work, submits reports of the work to the shop supervisor or division management, and communicates with customers to provide status updates on vehicle repairs and service requests.
6. Oversees proper maintenance of tools and shop equipment and the maintenance of clean, orderly, and safe conditions in the work area.
7. Maintains compliance with all federal, state and local rules and regulations.
8. Assists and makes recommendations in the budgeting of equipment and personnel.
9. May work as a mechanic when necessary.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Theory, care and operation of gasoline, electric, alternative, and diesel powered internal combustion engines and mechanical components for the maintenance and repair of passenger vehicles, light trucks, heavy construction equipment and trucks powered by battery, gasoline, alternative, or diesel fuels
- Techniques and methods of overhauling and repairing automotive, heavy gasoline and diesel powered equipment, and related components including engines, electrical systems, fuel systems, drive trains and suspensions
- Methods, materials, tools and equipment of the trade and their use in the maintenance and repair of automotive, heavy equipment, and other mechanical equipment
- Computerized fleet management software
- Testing considerations and techniques necessary to insure the reliability and safety of a vehicle's frame, chassis and running gear (may be required of some positions)
- Preventive maintenance inspection methods
- All federal, state and local fleet rules and regulations
- County of Orange policies and procedures

General Knowledge of

- Principles, methods, and practices pertaining to the operation of an automotive and construction equipment maintenance and repair shop
- Methods, tools, equipment, and materials used to repair, weld, paint, and modify the exteriors and interiors of automobiles, trucks and heavy equipment
- Principles of supervision
- Automated time keeping and record retention systems

Ability to

- Plan, layout, direct, inspect and assist in mechanical repair work
- Diagnose and locate mechanical defects and estimate the cost of repairs
- Supervise, train and evaluate employees
- Read, understand and interpret written directives with regards to factory letters and bulletins, vehicle manuals, and memorandums
- Establish and maintain effective working relationships with those contacted
- Clearly communicate both orally and in writing
- Operate a computerized fleet management software system and basic computer business applications, including Microsoft Word, Excel and Outlook
- Interface and provide customer service to customers, vendors, manufacturers, departments and staff personnel
- Prepare and maintain records and reports such as time, vehicle, preventive maintenance, repair orders, field repairs, tow service, sublets and warranties
- Carry out work in accordance with all applicable codes, regulations and guidelines pertaining to vehicle safety and proper operation of the vehicle/equipment including, but not limited to, Federal Motor Vehicle Safety Standard (FMVSS), Federal Consumer Product Safety Commission Regulation, California Code of Regulations Title 13 California Highway Patrol, and Occupational Safety and Health Administration

Education and Experience

Three (3) years as a Fleet Technician II or higher with the County of Orange.

Or

Six (6) years of journey level technical experience which demonstrates possession of the required knowledge and abilities.

Education or training that can be directly related to the knowledge and ability requirements may be substituted for up to one (1) year of journey level technical experience at the rate of three (3) semester units for one (1) month of experience and one (1) hour of job-related training for one hour of experience.

License/Certification

A valid California Class C Driver License by date of appointment. (Class "A" or "B" may be required for some assignments.)

Special Requirements

Incumbents are expected to provide their own hand tools as necessary.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Positions in this class typically require: body mobility to stand, stoop, kneel, crouch, squat, push, pull, or crawl; ability to move distances within and between warehouses, offices, and field locations; lift or move up to 50 pounds occasionally, and/or up to 25 pounds of force constantly to move objects; climb stairs and ladders, and work, traverse and balance atop of the stairs; ability to mount and dismount forklift and/or truck; vision efficient to read up close and at distances over 20 feet, and distinguish colors to identify road signs and signals, read color wire schematics, identify correct ordered parts and properly identify wire harness color coding; ability to detect, distinguish and determine odors; requires the ability to speak and hear well enough to communicate clearly and understandably in person to individuals and groups; possess manual dexterity sufficient to use hands, arms, and shoulders repetitively and without limitation to range and motion to operate keyboards, tools, and specialized equipment; ability to drive work vehicles on uneven roads.

Environmental and Working Conditions

Position assignments include outdoor and indoor field, yards, office settings, and shop locations. Work location shops and field conditions are subject to varying weather conditions, heat variance from an open air work shop and field service locations, and uneven terrain due to equipment location. Incumbents may be exposed to dust and chemicals from equipment being maintained, including paint line stripper, vegetation spray rigs, exhaust fumes from running equipment, gases, and fluids. May be exposed to intense noise levels from the shop, machinery, and equipment. May be required to wear safety equipment, including safety shoes and boots, glasses and face shields, ear plugs and muffs, protective gloves, and rain attire.



HEALTH SERVICES ANALYST

COUNTY OF ORANGE
Established Date: March 10,
2023
Revision Date: October 3,
2025

Bargaining Unit: MA Administrative Management

Class Code:
8228MA

DEFINITION:

This class is the first in a six-level **Health Services Management Series** responsible for planning and implementing behavioral health, correctional health, emergency medical, environmental health, medical health, or public health programs, which may include analyzing program information, evaluating program performance, conducting onsite reviews, administering provider contracts, and ensuring compliance with program, contract, and regulatory requirements.

The Health Services Management series includes the following:

Health Services Analyst (8228MA)
Health Services Administrator (8229MA)
Health Services Manager (8230MA)
Health Services Manager, Senior (8231MA)
Health Services Assistant Deputy Director (8232MA)
Health Services Deputy Director (8233MA)

CLASS CHARACTERISTICS:

An incumbent performs journey-level analysis, or assists with program administration or supervision, which may include providing training and reviewing work of employees at the same level, or serving as a supervisor to multiple non-management exempt employees, multiple contractors, or temporary staff who are assigned to assist with the work being performed. Decision-making includes selecting the method to address a problem or issue, subject to the constraints established by management objectives and direction, and making recommendations for management objectives and program administration.

The Health Services Analyst class is distinguished from the Health Services Administrator by the latter's responsibility for administering, implementing, and maintaining, through subordinates, all clinics and treatment services in a designated program. This class typically reports to a Health Services Administrator or Health Services Manager.

As assigned, an incumbent may serve as a lead worker, assigning work and monitoring work completion; or supervise staff, volunteers, and/or contractors. Supervision of staff includes conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Establishes research criteria, gathers and analyzes health services program information, and/or leads the information gathering process and uses technical and analytical expertise to develop findings and provide recommendations to higher-level staff.
2. Assists with the administration of complex programs, projects, or specific functional areas of large complex programs related, but not limited to the provision of mental, behavioral, and public health services.
3. Negotiates, develops, and manages contracts for medical care, correctional health, behavioral health, public health, and/or residential treatment services.
4. Monitors and evaluates program operations and program outcomes to ensure compliance with contract, budgetary, programmatic, and applicable regulatory requirements.
5. Coordinates with and provides consultation to community organizations, service providers, the public, County staff, and/or other external agencies; responds to inquiries, requests, and/or complaints; troubleshoots program-related operational issues; and facilitates and/or attends committees, contract negotiations, and related meetings.
6. Plans and conducts onsite reviews, assessments, surveys, training sessions, and investigations; and assists with project or program budget administration and procurement activities.
7. Assists with the management of operational activities, including the identification of business processes and opportunities for continuous improvement, drafting of operational policies and procedures, reviewing materials prepared by others, and the measurement and analysis of performance indicators.
8. Researches and develops original reports, materials, contracts, plans, proposals, and other documents; updates program websites; and makes presentations, as assigned.
9. As assigned, serves as a lead worker, or supervises staff, volunteers, and/or contractors, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
10. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:

Knowledge of

- Behavioral, correctional, emergency medical, environmental health, and/or public health services, including current trends in education, research, treatment, prevention, and related issues
- Contract negotiation, development, and management process to oversee contractual obligations
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- General budget administration and procurement to monitor and reallocate program budgets
- Community relationships/partnerships and providing customer service
- Principles and techniques in effective oral presentations and written reports
- Applicable Federal, State and local laws, codes, and regulations relevant to the area of assignment
- Supervisory principles, practices, and techniques, including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Health services operational area's service delivery model for program implementation and administration
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment
- Supervisory principles, practices, and techniques, including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work

Ability to

- Prioritize multiple competing work priorities and meeting deadlines
- Negotiate, develop, and manage contracts
- Research and analyze data, formulate, and articulate recommendations
- Monitor and interpret operational data, regulatory, and financial information
- Administer budgets and procurement processes, which may include negotiating contracts
- Prepare complex and detailed written reports, program policies, procedures, and contracts
- Maintain cooperative working relationships with other program managers and staff, other agencies, and the community
- Speak effectively to diverse audiences, including clinical, professional, and the public

- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work, as assigned
- Interpret and apply applicable laws, codes, regulations, and standards (based on assignment)

Education and Experience

Three (3) years of professional health administration experience related to assignment.

A Bachelor's degree in public health administration, public administration, behavioral health, biological or environmental science, or health related field may substitute for one (1) year of the required experience.

A Master's degree or higher in public health administration, public administration, behavioral health, biological or environmental science, or health related field may substitute for two (2) years of the required experience.

License/Certification

For some positions, possession of a valid California Driver's License, Class C or higher may be required by date of appointment.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



HEALTH SERVICES ADMINISTRATOR

Bargaining Unit: Administrative Management

Class Code:
8229MA

COUNTY OF ORANGE

Established Date: March 3, 2023

Revision Date: October 3, 2025

DEFINITION:

This class is the second in a six-level **Health Services Management Series** responsible for coordinating and administering a, behavioral health, correctional health, emergency medical, environmental health, medical health, or public health programs, which may include overseeing contracted providers in diagnostic and/or clinical settings and/or providing emergency planning and coordination of County Staff and agencies responsible for County-wide mutual aid emergency response.

The Health Services Management series includes the following:

Health Services Analyst (8228MA)
Health Services Administrator (8229MA)
Health Services Manager (8230MA)
Health Services Manager, Senior (8231MA)
Health Services Assistant Deputy Director (8232MA)
Health Services Deputy Director (8233MA)

CLASS CHARACTERISTICS:

An incumbent performs advanced journey-level analytical work and/or program administration, which includes performing the most complex individual contributor work assignments or supervision of a smaller program/function. Incumbents may supervise multiple staff engaged in non-management work, provide training and work review for same level management staff, or supervise one management level staff assigned to help support and coordinate the program and/or work unit. Decision-making includes providing input into management objectives and selecting the method to address a problem or issue, subject to the constraints established by management objectives and direction.

The Health Services Administrator class is distinguished from the Health Services Manager by the latter's overall responsibility for administering, overseeing, and managing several health services programs through subordinate staff. This class typically reports to the Health Services Manager.

As assigned, an incumbent may serve as a lead worker, assigning work and monitoring work completion; or supervise staff, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Establishes research criteria, gathers and analyzes health services program information, and/or leads the information gathering and analysis process, and uses technical and analytical expertise to develop findings; troubleshoots complex analytical issues, and provides recommendations to higher-level management.
2. Coordinates complex programs, projects, or specific functional areas related to the provision of behavioral health, correctional health, emergency medical, medical care, public health, and/or residential treatment services.
3. Negotiates, develops, and manages contracts for behavioral health, correctional health, emergency medical, medical care, public health, and/or residential treatment services.
4. Monitors and evaluates program operations and program outcomes to ensure compliance with contract, budgetary, programmatic, and applicable regulatory requirements.
5. As assigned, supervises the transactional or processing of operational activities performed by non-exempt staff.
6. Assists with overall operational management of a work unit, including the identification of business processes and opportunities for continuous improvement, drafting operational policies and procedures, and measurement and analysis of performance indicators.
7. Coordinates with and provides consultation to community organizations, service providers, program participants, the public, County staff, and/or other external agencies to ensure needs are being met by the program.
8. Plans and conducts studies, onsite reviews and inspections, surveys, training sessions, and investigations; and assists with projects or programs administration.
9. Researches and develops reports, contracts, proposals, materials, and other documents to present to stakeholders; serves as technical subject matter expert; reviews materials prepared by others; makes presentations; and debriefs and maintains documentation of lessons learned from emergency incidents and drills as assigned.
10. Responds to inquiries, requests, and/or complaints from vendors, the general public, County staff, and/or external agencies; troubleshoots program-related operational issues; and facilitates and/or attends meetings
11. Monitors upcoming trends, practices, and evolving/emerging technologies to incorporate in program policies, procedures, and practices
12. As assigned, serves as a lead worker, or supervises staff, volunteers, and/or contractors, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

13. Some assignments may serve as a liaison, advisor, and educator to County Staff, boards, external agencies, local jurisdictions, the public, and other stakeholders on emergency preparedness, mitigation, response, and recovery; evaluates and provides input on State and Federal agency policies to improve and advance processes and procedures.
14. Some assignments may supervise investigatory, inspection, enforcement, and processing activities performed by non-exempt staff and/or contractors; implements process improvements; serves as a subject matter expert to staff and internal and external groups; and ensures compliance with applicable environmental and regulatory laws, policies, and procedures.
15. May plan, coordinate, respond, and monitor the County-wide EMS systems in one or more assigned specialty areas, including Basic Life Support (BLS), Advanced Life Support (ALS), Health Care facilities, ambulance performance, data management and analytics, and trauma care systems.
16. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:

Knowledge of

- Behavioral, correctional, emergency medical, environmental health services, and/or public health services, including current trends in education, research, treatment, prevention and related issues
- Emergency response medical services coordination and transition field care and resource delivery
- Principles and practices of emergency or disaster management including emergency preparedness, emergency management operations, mitigation, response, and recovery
- Principles and practices of project management, in assigned health services operational area
- Principles and practices of environmental health in relation to food and pool safety, water quality, and hazardous materials compliance operations
- Contract negotiation, development, and management process to oversee contractual obligations
- Qualitative and quantitative research principles and methods to draft and present reports
- Principles and applications of critical thinking and analysis
- Principles and practices of planning and conducting inspections and investigations
- Principles and techniques in creating effective oral presentations and written reports
- General budget administration and procurement to monitor and reallocate program budgets
- Supervisory principles, practices, and techniques, including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Applicable Federal, State, and local laws, codes, and regulations relevant to the area of responsibility

- Health services operational area's service delivery model for program implementation and administration
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Administer health services programs, projects, and activities, related, but not limited to the provision of behavioral health, correctional health, emergency medical, environmental health services, public health, and residential treatment services
- Effectively administer emergency preparedness, mitigation, response, and recovery activities
- Prioritize multiple and competing work priorities and meeting deadlines
- Research and analyze data, formulate and articulate recommendations for most complex work assignments
- Negotiate, develop and manage contracts
- Monitor and interpret operational data, regulatory, and financial information and statistics
- Administer budgets and procurement processes
- Develop and prepare reports and presentations
- Recommend and implement policies and procedures
- Resolve conflict and facilitate consensus
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands and assigning/monitoring work, as assigned
- Interpret and apply applicable laws, codes, regulations and standards (based on assignment)
- Utilize a computer and relevant software applications
- Speak effectively to diverse audiences, including clinical, professional, and the public

Education and Experience

One (1) year of experience as a Health Services Analyst or its equivalent with the County of Orange.

Or

Four (4) years of professional health administration or emergency/disaster management experience related to assignment.

A Bachelor's degree in public health administration, public administration, behavioral health, biological or environmental science, communications, emergency management, or health related field may substitute for one (1) year of the required experience.

A Master's degree or higher in public health administration, public administration, behavioral health, biological or environmental sciences, communications, emergency management, or health related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- Department of Homeland Security or Department of Justice Secret Security clearance
- State of California Emergency Management certificate
- State of California Emergency Management Specialist certificate
- Certified Emergency Manager (CEM®) certificate
- Federal Emergency Management Agency - National Incident Management Systems (NIMS) Training
- Airport Security Coordinator (ASC) training
- Registered Environmental Health Specialist certificate
- State of California Professional Geologist or Professional Engineering License
- Valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



HEALTH SERVICES MANAGER

Bargaining Unit: Administrative Management

Class Code:
8230MA

COUNTY OF ORANGE

Established Date: March 10, 2023

Revision Date: October 3, 2025

DEFINITION:

This class is the third in a six-level **Health Services Management Series** responsible for supervising a health services unit, larger program, or multiple smaller behavioral health, correctional health, emergency medical, environmental health, public health, and/or other health programs.

The Health Services Management series includes the following:

Health Services Analyst (8228MA)
Health Services Administrator (8229MA)
Health Services Manager (8230MA)
Health Services Manager, Senior (8231MA)
Health Services Assistant Deputy Director (8232MA)
Health Services Deputy Director (8233MA)

CLASS CHARACTERISTICS:

Incumbents supervise multiple small programs/work units or a single large work unit/program, typically with supervisory authority over one or more management-level staff and/or multiple high-level supervisory staff. Decision-making includes using discretion for program decisions to achieve management objectives, with accompanying accountability for those decisions. An individual contributor who is a designated subject matter expert and who serves as a manager of a Countywide enterprise or highly technical and specialized function without direct supervisory responsibilities may be assigned to this level.

The Health Services Manager class is distinguished from the Health Services Manager, Senior by the latter's responsibility in providing administrative direction over a major division. This class typically reports to the Health Services Manager, Senior.

As assigned, an incumbent supervises management and non-management level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Plans, coordinates, and evaluates health services programs and/or projects; prepares and administers ongoing daily operations to comply with strategic goals and preferred outcomes in areas including, but not limited to behavioral health, correctional health, emergency medical, environmental health services, and medical health, and public health.
2. Plans, develops, directs, integrates, monitors, and evaluates medical, public health and hospital related service programs provided or coordinated by the County.
3. Directs, coordinates, and participates in the development and implementation of program goals, objectives, policies, procedures and priorities that balance both mandated services and community needs.
4. Coordinates, consults, and/or provides guidance on patient care, public health, emergency medical and/or clinical services, and disaster planning as applicable; and identifies and provides education on current program related public health, medical and nursing guidelines for external stakeholders and internal staff as applicable.
5. Researches, analyzes, develops, reviews, and/or approves medical, clinical, environmental, grant, and related reports, records marketing and communications materials, agreements, grant applications, presentations, and other documents; and develops and makes recommendations to higher-level management
6. Negotiates, develops, and manages contracts; and monitors and evaluates for compliance with contractual obligations.
7. Develops and maintains effective working relationships with a variety of public and private organizations, including other County departments and agencies, advocacy groups, and client organizations.
8. Prepares, administers, and monitors the program budget to ensure the accomplishment of program and service objectives within budget restrictions.
9. Prepares and presents a variety of reports and correspondence to higher-level management, staff, and the community.
10. Supervises professional, paraprofessional, and support level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
11. Ensures compliance with all Federal, State and County applicable regulations, policies, and procedures, quality and performance standards.
12. May serve as a staff and/or technical advisor during emergencies and exercises; ensures that all appropriate emergency management principles, protocols, and policies are met; must be prepared to respond to emergencies 24 hours per day, seven days per week, and 365 days per year.
13. May oversee the emergency medical and/or clinical protocols of the County; directs the development of service and treatment standards; and oversees quality assurance mechanisms.
14. Ensures a health and safe work environment; and ensures compliance with applicable regulations, policies, and procedures.
15. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:**Knowledge of**

- Health services operational areas related, but not limited to laboratory management, the provision of behavioral, clinical, medical, nutrition and dental health services, disease control and epidemiology, environmental health services, and chronic disease testing and treatment, including current trends in education, research, treatment, prevention, emergency medical services, and related issues
- Principles and practices of developing, implementing, and monitoring behavioral health, correctional health, emergency medical, environmental health services, medical, and public health protocols
- Principles and practices of planning and administering emergency management medical services including systems and response programs
- Promotion of health and prevention of disease and disability and case management
- Community needs assessment
- Health care needs of diversified populations consisting of a variety of social, cultural, and ethnic backgrounds
- Principles and practices of environmental health in relation to food and pool safety, water quality, and hazardous materials compliance operations
- Principles and practices of chemistry and biology areas related to environment or human health
- Principles and practices of laboratory processes and operations
- Principles and practices of geology, hydrogeology, and engineering geology areas pertaining to environmental resources management, mitigation, and compliance
- Principles and practices of planning and conducting inspections and investigations
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles and practices of treatment protocols, and medical terminology
- Public administration and program management, including planning, implementation, evaluation, and reporting
- Organizational, personnel, budget, and fiscal management
- An assigned health services operational area's service delivery model for program implementation and administration
- Qualitative and quantitative research principles and methods

- Principles and applications of critical thinking and analysis
- Principles and techniques in drafting effective oral presentations and written reports
- Principles and practices of conflict resolution and negotiation strategies
- Applicable Federal, State, and local laws, codes, and regulations relevant to the area of assignment
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Direct, manage, plan, organize, and coordinate programs and services on a comprehensive, County-wide level to meet community needs in behavioral health, correctional health, emergency medical, environmental health, medical, and public health
- Direct, manage and implement assigned emergency medical or public health services programs, projects, protocols, and activities
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Oversee adherence to quality assurance and standards
- Interpret, monitor, and report financial information and statistics
- Research industry trends and best practices; and analyze data, formulate, and articulate recommendations
- Prepare complex and detailed written reports, program policies, procedures, and contracts
- Recommend, develop, and implement protocols, policies and procedures
- Establish and maintain cooperative working relationships with management, staff, other agencies, and the community to facilitate group discussions, build consensus and resolve escalated issues
- Exercise political acumen, tact, and diplomacy
- Interpret and apply applicable laws, codes, regulations, and standards
- Utilize a computer and relevant software applications
- Speak effectively to diverse audiences, including clinical, professional, and the public

Education and Experience

One (1) year of experience as a Health Services Administrator or two (2) years of experience as a Health Services Analyst or its equivalent with the County of Orange.

Or

Five (5) years of professional health administration or emergency/disaster management experience related to assignment; must include one (1) year of lead/supervisory experience.

A Bachelor's degree in public health administration, public administration, biological or environmental sciences, communication, emergency management, behavioral health, or health related field may substitute for one (1) year of the required experience.

A Master's degree or higher in public health administration, public administration, biological or environmental sciences, communication, emergency management, behavioral health, or health related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- License from the State of California Board of Behavioral Sciences or Board of Psychology
- State of California Public Health Microbiologist Certificate
- State of California Registered Dietitian Certificate
- State of California Registered Nurse License
- State of California Paramedic License
- State of California Emergency Medical Technician License
- State of California Emergency Management Specialist Certificate
- Registered Environmental Health Specialist Certificate
- 40-hour Hazardous Wastes Operation & Emergency Response Certificate
- International Code Council for Underground Storage Tank and Aboveground Storage Tank Certificates
- Professional Engineer or Professional Geologist License
- Valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult

situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



HEALTH SERVICES MANAGER, SENIOR

Bargaining Unit: MA Administrative Management

Class Code:
8231MA

COUNTY OF ORANGE

Established Date: March 10, 2023

Revision Date: October 3, 2025

DEFINITION:

This class is the fourth in a six-level **Health Services Management Series** responsible for managing a health care services function that includes multiple units and/or programs providing services related to behavioral health, correctional, emergency medical, environmental health, medical, public health, and/or other health services.

The Health Services Management series includes the following:

Health Services Analyst (8228MA)

Health Services Administrator (8229MA)

Health Services Manager (8230MA)

Health Services Manager, Senior (8231MA)

Health Services Assistant Deputy Director (8232MA)

Health Services Deputy Director (8233MA)

CLASS CHARACTERISTICS:

Incumbents oversee multiple highly complex health services operational functions and/or an organizational work unit exercising direct supervision to multiple management level employees and multiple licensed clinical supervisory level employees, indirect supervision to additional management and/or non-management level employees, and have responsibility for significant budget/funding decisions. Decision-making includes establishing and overseeing work unit objectives and goals, exercising considerable discretion in selecting the method to address a problem or issue, and fostering collaboration among and between the work units supervised as well with work units under the direction of others.

The Health Services Manager, Senior is distinguished from the Health Services Manager based on its responsibility for more complex research, a larger range of health programs and services, and a larger span of control over supervisory, professional, administrative and technical classifications. This level oversees greater programmatic complexity, broader authority over diverse staff, and a higher degree of strategic accountability and policy impact. Positions at this level typically report to a Health Services Assistant Deputy Director or Health Services Deputy Director.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Provides operational and technical management and direction to staff including, but not limited to one or more of the following health services areas: behavioral health, correctional health, emergency medical, environmental health, public health, and other health services.
2. Provides operational oversight of the pre-hospital emergency medical services system, medical/health preparedness and disaster response, and the management of grants.
3. Develops, implements, and evaluates health services and programs targeting children, youth, family, adolescent, older adult, homeless individual, maternal, refugee, and/or veteran populations; ensures compliance with strategies and performance goals; manages work systems and processes; maintains and updates procedures, and ensures compliance; research trends and best practices; and recommends and implements changes.
4. Oversees and conducts performance evaluations, employee development, and hiring, discipline, and termination procedures as well as directly supervises management, professional, paraprofessional, and support staff
5. Troubleshoots and resolves program or work unit issues and keeps higher-level management informed of issues/resolution.
6. Develops and administers work unit budgets and procurement processes; reviews and approves budget requests and transactions; negotiates and manages contracts; researches and analyzes financial information; makes resource allocation recommendations; and implements resource allocation decisions.
7. Oversees the preparation of medical, clinical, dental, environmental health, nutrition, laboratory, grant, operational, and related reports, records, plans, contracts, proposals, and other documents; oversees the research and analysis of policy and related information; and makes recommendations to higher-level management.
8. Coordinates with the general public, emergency medical tasks forces (locally, regionally, and statewide) service providers, vendors, internal staff, and/or external agencies; establishes and manages partnerships; convenes, facilitates, and attends meetings; and prepares and makes presentations to the public, elected officials, appointment boards, and other stakeholders.
9. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:

Knowledge of

- Principles and practices of assigned health services operational areas related, but not limited to behavioral health, correctional health, emergency medical, environmental health, public health, and other health services
- Supervisory principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work

- Principles and practices of treatment protocols and medical terminology
- Promotion of health and the prevention of disease and disability and case management
- Community needs assessment
- Health care needs of diverse populations consisting of a variety of social, cultural, and ethnic backgrounds
- Principles and practices of modern business management
- Principles and practices of budgeting and fiscal management
- Principles and practices of health services program planning and administration
- Principles and practices of organizational and personnel management
- Principles and practices of stormwater management and hydrology
- Principles and practices of service delivery models
- Principles and practices of project management
- Principles and practices of strategic planning and performance measurement
- Principles and practices of group facilitation and building consensus
- Principles and practices of modern procurement, and contract negotiation and administration
- Best practices, trends, and emerging technologies
- Principles and methods of qualitative and quantitative research
- Principles and applications of critical thinking and analysis
- Principles and techniques of effective oral presentations and written reports
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, and regulations
- Principles in providing customer service
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

- Manage the operations of assigned health services division
- Manage the operations, services, and programs of pre-hospital emergency medical services, medical/health preparedness and disaster response, and grant management
- Exercise appropriate judgement in answering questions and releasing information; analyze and project consequence of decisions and/or recommendations
- Supervise and evaluate staff performance, training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Ensure ongoing compliance with strategic plans, measure performance, and participate in the development of goals and strategic objectives
- Manage budgets and allocate resources
- Interpret, monitor, and report financial information and statistics
- Monitor and execute procurement activities for assigned work unit; and negotiate and administer contracts
- Manage large-scale complex projects and/or initiatives, enterprise projects, and/or overseeing the management of multiple projects simultaneously
- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Research, recommend, and implement industry trends, solutions, and best practices
- Author and oversee the preparation of original reports, content, documents, and presentations
- Make presentations to stakeholders, elected officials, and County leadership
- Develop and implement protocols, policies and procedures
- Establish and maintain cooperative working relationships with management, staff, other agencies, and the community to facilitate group discussions, build consensus and resolve escalated issues
- Exercise political acumen, tact, and diplomacy
- Collaborate with program stakeholders, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Provide customer service and resolve escalated issues
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Health Services Manager or two (2) years of experience as a Health Services Administrator or its equivalent with the County of Orange.

Or

Five (5) years of professional health administration, emergency/disaster management experience or environmental health regulatory compliance experience related to assignment; must include two (2) years of lead/supervisory experience.

A Bachelor's degree in public health administration, public administration, behavioral health, biological or environmental sciences, business administration, communications, emergency management, or health related field may substitute for one (1) year of the required experience.

A Master's degree or higher in public health administration, public administration, behavioral health, biological or environmental sciences, business administration, communications, emergency management, or health related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- License from the State of California Board of Behavioral Sciences or Board of Psychology
- State of California Public Health Microbiologist Certificate
- State of California Registered Dietitian Certificate
- State of California Clinical Social Worker License
- State of California Marriage & Family Therapist License
- State of California Psychologist License
- State of California Clinical Laboratory Director Board Certification
- State of California Security Risk Assessment Certification
- State of California Registered Nurse License
- State of California Paramedic License
- State of California Emergency Medical Technician License
- State of California Emergency Management Specialist Certificate
- Physical Therapy Board of California License
- Occupational Therapy Board of California License
- State of California Registered Environmental Health Specialist Certificate
- State of California Qualified Stormwater Practitioner Inspector License
- State of California Qualified Stormwater Pollution Prevention Plan Developer License
- Valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



HEALTH SERVICES ASSISTANT DEPUTY DIRECTOR

COUNTY OF ORANGE
Established Date: March 10,
2023
Revision Date: October 3,
2025

Bargaining Unit: MA Administrative Management

Class Code:
8232MA

DEFINITION:

This class is the fifth in a six-level **Health Services Management Series** responsible for managing the delivery of core Health Care Agency functions, which may include multiple divisions and units within one of the following core functions: behavioral health, correctional health emergency medical, medical health, public health, and/or other health services.

The Health Services Management series includes the following:

Health Services Analyst (8228MA)
Health Services Administrator (8229MA)
Health Services Manager (8230MA)
Health Services Manager, Senior (8231MA)
Health Services Assistant Deputy Director (8232MA)
Health Services Deputy Director (8233MA)

CLASS CHARACTERISTICS:

Through subordinate managers, an incumbent is responsible for directing and coordinating the complex operational functions of multiple health services divisions or an Agency or County specialized function that includes making broad policy decisions and recommendations to the Deputy Director or Medical Director, and carrying out the decisions on behalf of the organization. Such decisions provide context for the work to be accomplished by subordinates supervised within the units managed. The Health Services Assistant Deputy Director class is distinguished from the Health Services Deputy Director by the latter's overall management of a Health Services Department/Division and directs all administrative and financial activities. This position reports to the Health Services Deputy Director.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Develops, implements, and evaluates health services programs, large-scale projects, and operations; plans and evaluates system-wide procedures, policies, strategies, and goals; maintains, updates, and ensures procedural and legal compliance for programs and projects, including policies and procedures; and plans and implements process improvements as well as health policy, research, and communications, and the coordination of behavioral health, correctional health, emergency medical, public health, and specialized medical services.
2. Develops, administers, and oversees budgets; oversees procurement activities relevant for the health services division area; reviews and approves budget request transactions; researches and analyzes financial information; makes resource allocation and inventory decisions and recommendations; and ensures adherence to budgetary and other applicable regulatory requirements, policies, and procedures.
3. Oversees and conducts performance evaluations, employee development, and hiring, discipline, and termination procedures as well as directly supervises management and indirectly management professional, paraprofessional, and support staff, as assigned.
4. Oversees the research and analysis of department-wide policy and related information; and makes recommendations, including corrective actions, to higher-level management.
5. Oversees the preparation of and/or prepares, reviews, designs, and/or maintains reports, records, plans, contracts, and other documents; coordinates the research and analysis of department-wide policy and related information; and makes recommendations to higher-level management.
6. Coordinates with County officials, the public, respective departments, vendors, service providers, and/or external agencies; develops and manages partnerships; responds to escalated complaints and operational issues; and manages ongoing program operations and processes.
7. Convenes, facilitates, and/or attends meetings, briefings, and presentations with internal departments, commissions, Boards, and/or other external stakeholders; and prepares and makes presentations.
8. Coordinates, consults, and/or provides guidance on disaster planning, as applicable; and identifies and provides education and training for internal staff, as applicable.
9. Performs other duties of a similar nature and level as assigned.

MINIMUM QUALIFICATIONS:

Knowledge of

- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles and practices of health services operational areas including but not limited to health policy, research, and behavioral health, emergency medical, environmental health, medical health, public health and/or other health services
- An assigned health services operational area's service delivery model for program implementation and administration

- Organizational, personnel, budget fiscal and project management
- Principles and practices of strategic planning and performance measurement
- Principles and practices of group facilitation and building consensus
- Project and contract management principles
- Qualitative and quantitative research techniques and/or methods
- Principles and techniques of preparing effective oral presentations and written reports
- Principles and practices of conflict resolution and negotiation strategies
- Applicable Federal, State, and local laws, codes, and regulations
- Community needs assessment
- Health care needs of diversified populations consisting of a variety of social, cultural, and ethnic backgrounds
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Direct, manage, plan, organize and coordinate assigned health services programs, projects, and activities
- Identify strategic objectives, ensuring ongoing compliance, and measuring performance
- Manage budgets and allocate resources to achieve strategic objectives
- Interpret, monitor, and report financial information and statistics
- Supervise and evaluate staff performance, train, coach, coordinate deadlines, prioritize work demands, and assign/monitor work
- Monitor and direct procurement activities for assigned health services division or program
- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Research and analyze industry trends, implement solutions, and best practices
- Prepare and/or direct the preparation of complex and detailed written reports, documents, program policies, and procedures
- Make presentations to stakeholders, elected officials, and County leadership

- Establish and maintain cooperative working relationships with management, staff, other agencies and the community to facilitate group discussions build consensus and resolve escalated issues
- Exercise political acumen, tact, and diplomacy
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations
- Collaborate with program stakeholders, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Health Services Manager, Senior or two (2) years of experience as a Health Services Manager or its equivalent with the County of Orange.

Or

Five (5) years of health administration management experience related to assignment, including program planning, client services, program evaluation, budget administration, or community resource coordination; must include one (1) year of supervisory experience.

A Bachelor's degree in public health administration, public administration, behavioral/mental health, biological or environmental sciences, or health related field may substitute for one (1) year of the required experience.

A Master's degree or higher in public health administration, public administration, behavioral/mental health, biological or environmental sciences, or health related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- License from the State of California Board of Behavioral Sciences or Board of Psychology
- State of California Public Health Microbiologist Certificate
- State of California Registered Dietitian Certificate
- State of California Clinical Social Worker License
- State of California Marriage & Family Therapist License
- State of California Psychologist License
- State of California Registered Nurse License
- State of California Clinical Laboratory Director Board Certification
- State of California Security Risk Assessment Certification

- IS-702.A. National Incident Management System (NIMS) Public Information Systems Certificate
- IS-706 National Incident Management System (NIMS) Intrastate Mutual Aid - An Introduction Certificate
- IS-800.B. National Incident Management System (NIMS) National Response Framework, An Introduction Certificate
- State of California Emergency Medical Technician Certificate, Paramedic License
- Physical Therapy Board of California License
- Occupational Therapy Board of California License
- State of California Registered Environmental Health Specialist Certificate
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation. Possess ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



HEALTH SERVICES DEPUTY DIRECTOR

COUNTY OF ORANGE
Established Date: March 3,
2023
Revision Date: October 3,
2025

Bargaining Unit: MA Admin Management

Class Code:
8233MA

DEFINITION:

This class is the sixth in a six-level **Health Services Management Series** responsible for managing delivery of core Health Care Agency functions, which may include multiple divisions and units within one of the following core functions: Behavioral Health, Correctional Health, Emergency Medical, Public Health, Specialized Medical Services and/or other health services.

The Health Services Management series includes the following:

Health Services Analyst (8228MA)
Health Services Administrator (8229MA)
Health Services Manager (8230MA)
Health Services Manager, Senior (8231MA)
Health Services Assistant Deputy Director (8232MA)
Health Services Deputy Director (8233MA)

CLASS CHARACTERISTICS:

Through subordinate managers, an incumbent oversees multiple divisions or programs that include making broad policy decisions and recommendations to the department head or County executive team. Work includes making interpretive decisions on behalf of the organization regarding the means for executing the goals established by the relevant executives and governing body subject to constraints imposed by available technology and resources. Such interpretive decisions provide context for the work to be accomplished by subordinates supervised within the units managed.

The Health Services Deputy Director class is distinguished from the Health Services Assistant Deputy Director by the latter assists in the overall management of a Health Services Department/Division and directs all administrative and financial activities. This class is further distinguished from the Health Services Assistant Deputy Director in that the Health Services Deputy Director acts and represents all the Health Services Department/Division. This class reports to the Executive Manager or Chief over a Health Services Department/Division.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Develops, implements, and evaluates health services programs, large-scale projects, and operations related, but not limited to health policy, research, and communications, and the coordination of behavioral health, correctional health, public health and specialized medical services, and other related health areas.
2. Plans and evaluates system-wide procedures, policies, strategies, and goals; maintains, updates, and ensures procedural compliance for assigned health services programs and projects; and plans and implements process improvements.
3. Develops, administers, and oversees budgets; oversees procurement activities for the assigned health services division; reviews and approves budget requests and transactions; analyzes financial information; makes resource allocation decisions and recommendations; and ensures adherence to budgetary and other applicable regulatory requirements, policies, and procedures.
4. Oversees the preparation of and maintenance of medical, clinical, operational, and related reports, case and inspection documents, drug utilization and other records, plans, contracts, and other documents; analyzes data sets; oversees the research and analysis of department-wide policy and related information; and makes recommendations, including corrective actions to higher-level management.
5. Coordinates, consults, and/or provides guidance on patient care, emergency medical services, and disaster planning, as applicable; and identifies and provides education and training on current medical and nursing guidelines for internal staff, as applicable.
6. Oversees and conducts performance evaluations, employee development, and hiring, discipline, and termination procedures as well as directly and indirectly supervises management, professional, paraprofessional, and support staff, as assigned.
7. Oversees the preparation of and/or prepares, reviews, and/or maintains reports, records, plans, contracts, and other documents; coordinates the research and analysis of department-wide policy and related information; and makes recommendations to higher-level management.
8. Coordinates with County officials, the public, vendors, service providers, and/or external agencies; develops and manages partnerships; responds to escalated complaints and operational issues; and manages ongoing program operations and processes.
9. Convenes, facilitates, and/or attends meetings, briefings, and presentations with internal departments, commissions, Boards, and/or other external stakeholders; and prepares and makes presentations.

MINIMUM QUALIFICATIONS:

Knowledge of

- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles and practices of health services operational areas including but not limited to health policy, research, and communications, behavioral health, correctional health, emergency medical services, specialized medical services, public health and other health services areas
- An assigned health services operational area's service delivery model for program implementation and administration
- Organizational, personnel, budget, fiscal and project management
- Principles and practices of strategic planning and performance measurement
- Principles and practices of group facilitation and building consensus
- Project and contract management principles
- Qualitative and quantitative research techniques and methods
- Principles and techniques of preparing effective oral presentations and written reports
- Principles and practices of conflict resolution and negotiation strategies
- Applicable Federal, State, and local laws, codes, and regulations
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Direct, manage, plan, organize and coordinate assigned health services programs, projects, and activities
- Identify strategic objectives, ensuring ongoing compliance, and measuring performance
- Manage budgets and allocate resources to achieve strategic objectives
- Interpret, monitor, and report financial information and statistics
- Supervise and evaluate staff performance, train, coach, coordinate deadlines, prioritize work demands, and assign/monitor work
- Monitor and direct procurement activities for assigned health services division

- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Research and analyze industry trends and implement solutions, and best practices
- Prepare and/or direct the preparation of complex and detailed reports, documents, and program policies, procedures
- Make presentations to stakeholders, elected officials, and County leadership
- Develop and implement policies and procedures
- Establish and maintain cooperative working relationships with management, staff, other agencies and the community to facilitate group discussions, build consensus and resolved escalated issues
- Exercise political acumen, tact, and diplomacy
- Collaborate with program stakeholders, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills to facilitate interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Health Services Assistant Deputy Director or two (2) years of experience as a Health Services Manager, Senior or its equivalent with the County of Orange.

Or

Six (6) years of health administration management experience related to assignment, including program planning, client services, program evaluation, budget administration, or community resource coordination; must include two (2) years of supervisory experience.

A Bachelor's degree in public health administration, public administration, behavioral/mental health, biological or environmental sciences, or health related field may substitute for one (1) year of the required experience.

A Master's degree or higher in public health administration, public administration, behavioral/mental health, biological or environmental sciences, or health related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- License from the State of California Board of Behavioral Sciences or Board of Psychology
- State of California Public Health Microbiologist Certificate
- State of California Registered Dietitian Certificate
- State of California Clinical Social Worker License
- State of California Marriage & Family Therapist License
- State of California Psychologist License
- State of California Registered Nurse License
- State of California Clinical Laboratory Director Board Certification
- State of California Security Risk Assessment Certification
- IS-702.A. National Incident Management System (NIMS) Public Information Systems Certificate
- IS-706 National Incident Management System (NIMS) Intrastate Mutual Aid - An Introduction Certificate
- IS-800.B. National Incident Management System (NIMS) National Response Framework, An Introduction Certificate
- State of California Emergency Medical Technician Certificate, Paramedic License
- State of California Registered Environmental Health Specialist Certificate
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



PUBLIC INFORMATION AND AFFAIRS ANALYST

Bargaining Unit: MA Administrative Management

Class Code:
8277MA

COUNTY OF ORANGE

Established Date: March 10, 2023

Revised Date: October 3, 2025

DEFINITION:

This class is the first in a six-level **Public Information and Affairs Management Series** responsible for developing and making recommendations for internal and external strategic messaging and communications; ensuring that accurate and timely information is released; developing and executing social media strategies; analyzing proposed legislation; coordinating with department liaisons; preparing written content including press releases, newsletters, legislative letters, and informational materials; event planning; and executing and developing marketing and other collateral materials.

The Public Information and Affairs Management series includes the following:

Public Information and Affairs Analyst (8277MA)

Public Information and Affairs Administrator (8278MA)

Public Information and Affairs Manager (8279MA)

Public Information and Affairs Manager, Senior (8280MA)

Public Information and Affairs Assistant Deputy Director (8281MA)

Public Information and Affairs Deputy Director (8287MA)

CLASS CHARACTERISTICS:

An incumbent performs journey-level analysis or assists with Public Information/Public Affairs program administration or supervision, which may include providing training and work review to employees at the same level, or serving as a supervisor to one non-management employee, multiple contractors, or temporary staff who are assigned to assist with the work being performed. Decision-making includes selecting the method to address a problem or issue, subject to the constraints established by management objectives and direction and making recommendations for management objectives and program administration.

As assigned, an incumbent may serve as a lead worker, assigning work and monitoring work completion; or supervise staff, volunteers, and/or contractors. Supervision of staff includes conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Establishes research criteria, gathers information and/or leads the information gathering process, analyzes information, references legislation and grants, and uses technical and analytical expertise to develop findings and provide recommendations to higher-level staff.
2. Assists with the administration of less complex programs, projects, or specific functional areas of large complex programs; plans and conducts studies, surveys, training sessions, and investigations; assists with project or program budget administration and procurement activities.
3. Develops internal and external strategic messaging; ensures accuracy and timeliness of communications; and serves as a media spokesperson and/or provides supports to the Public Information Officer for media activities.
4. Develops and executes marketing strategies, campaigns, and collateral; develops, monitors, and updates websites and social media content; and/or conducts outreach and community relation activities and events
5. Analyzes a variety of public information and/or legislative/grants proposals to assess the impact on applicable agency/agencies. Assists with the management of operational activities including the identification of business processes and opportunities for continuous improvement, drafting of operational policies and procedures, and measurement and analysis of performance indicators.
6. Researches and develops original reports, press releases, media alerts, marketing collateral, newsletters, digital content, speeches, letters, agendas, text for legislation, articles, presentations, and other materials; reviews materials prepared by others; and makes presentations.
7. Responds to inquiries from and/or coordinates activities with County staff, the media, legislators, vendors, the general public, trade associations, and/or external agencies; troubleshoots program-related operational issues; and facilitates and/or attends meetings.
8. As assigned, serves as a lead worker, or supervises staff, volunteers, and/or contractors, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
9. Administers and ensures compliance with applicable regulations, policies, and procedures.
10. Performs other duties of a similar nature and level.

MINIMUM QUALIFICATIONS

Knowledge of

- Principles and practices of Public Information, Public Affairs, Public Administration, and Legislative Affairs including strategic messaging and communications, media relations, marketing, public relations, website and social media execution, legislation analysis, and event planning
- Principles and practices of project and program administration
- Principles and practices of federal, state, and local legislative processes and government organizational structures

- Principles and practices of journalism and the media including media law, public records law, media types (e.g. print, broadcast, and online), responding to media requests, and deadlines
- Principles and practices of marketing material concept development and execution including graphic design, print production, social media, and web publishing
- Principles and techniques of effective oral presentations, public speaking, and written reports
- Supervisory principles, practices, and techniques including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Applicable federal, state, and local laws, codes, regulations, and standards
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Administer Public Information, Legislative Affairs, and Public Affairs programs and activities in assigned area of responsibility
- Identify, analyze, and make recommendations on legislation that impacts the County of Orange and its operations
- Develop strategic messaging and communications
- Plan and respond appropriately to media events, requests, and queries
- Supervise the coordination, preparation, and publication of media, marketing, promotional, and/or communication materials
- Administer programs and projects administration
- Prioritize multiple competing work priorities and meeting deadlines
- Research and analyze data, formulating issues, and articulating recommendations
- Monitor and interpret operational data, regulatory, legislative, and financial information, and statistics
- Administer budgets and procurement processes, which may include negotiating contracts and managing vendor work
- Develop and prepare reports, press releases, speeches, and presentations
- Recommend and implement policies and procedure
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work, as assigned

- Interpret and apply applicable laws, codes, regulations, and standards
- Provide excellent customer service
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

Three (3) years of professional public information, public affairs, political science, and/or legislative affairs experience related to assignment.

A Bachelor's degree in communications, public relations, business administration, public administration, political science, or a related field may substitute for one (1) year of the required experience.

A Master's degree in communications, public relations, business administration, public administration, political science, or a related field study may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- Completion of Federal Emergency Management Administration (FEMA) Incident Command Structure (ICS) training modules
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



**PUBLIC INFORMATION AND AFFAIRS
ADMINISTRATOR**

Bargaining Unit: MA Administrative Management

Class Code:
8278MA

COUNTY OF ORANGE

Established Date: March 10, 2023

Revised Date: October 3, 2025

DEFINITION:

This class is the second in a six-level **Public Information and Affairs Management Series** responsible for developing and making recommendations for internal and external strategic messaging and communications, ensuring that accurate and timely information is released, developing and executing social media strategies, analyzing proposed legislation, developing legislative strategy, preparing written content including press releases, newsletters and informational materials, event planning, and executing and developing marketing and other collateral materials.

The Public Information and Affairs Management series includes the following:

Public Information and Affairs Analyst (8277MA)

Public Information and Affairs Administrator (8278MA)

Public Information and Affairs Manager (8279MA)

Public Information and Affairs Manager, Senior (8280MA)

Public Information and Affairs Assistant Deputy Director (8281MA)

Public Information and Affairs Deputy Director (8287MA)

CLASS CHARACTERISTICS:

An incumbent performs advanced journey-level analytical work and/or program administration for Public Information/Public Affairs which includes performing the most complex individual contributor work assignments or supervision of a smaller program/function. Incumbents may supervise multiple staff engaged in non-management work, provide training and work review for same level management staff, or supervise one (1) management level staff assigned to help support and coordinate the program and/or work unit. Decision-making includes providing input into management objectives and selecting the method to address a problem or issue, subject to the constraints established by management objectives.

As assigned, an incumbent may serve as a lead worker, assigning work and monitoring work completion; or supervise staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Establishes research criteria, gathers information and/or leads the information gathering process, analyzes information, and uses technical and analytical expertise to develop findings and provide recommendations to higher-level staff.
2. Administers smaller, less complex programs, projects, or specific functional areas of large complex programs; plans and conducts studies, surveys, training sessions, and investigations; and administers program/project budget and procurement activities.
3. Develops internal and external strategic messaging ensuring accuracy and timeliness of communications; may serve as a media spokesperson and/or Public Information Officer (PIO); coordinates the development of standardized communication tools, protocols and practices; and may coordinate public records request activities and responses.
4. Manages the development and execution of marketing and/or communication strategies, campaigns, collateral, and/or brand guidelines; may oversee the development and execution of social media and web.
5. Content strategies; ensures the accuracy of social media, website and/or legislative summary content, posts, and updates; and/or coordinates special events.
6. Performs impact analyses of proposed legislation and/or of a variety of other public information to assess the impact on applicable agency/agencies.
7. As assigned, supervises transactional, investigatory, or processing operational activities performed by non-exempt staff; and assists with overall operational management of a work unit including the identification of business processes and opportunities for continuous improvement, drafting of operational policies and procedures, and measurement and analysis of performance indicators.
8. Researches, develops, and disseminates original reports, press releases, marketing collateral, newsletters, digital content, talking points, calendars, presentations, and other materials; serves as a technical subject matter expert; reviews materials prepared by others; makes presentations.
9. Responds to inquiries, including public information requests, and coordinates activities with County staff, the media, legislators, vendors, the general public, and/or external agencies; troubleshoots program-related operational issues; and facilitates and/or attends meetings.
10. As assigned, serves as a lead worker, or supervises staff, volunteers, and/or contractors, including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
11. Performs other duties of a similar nature and level.

MINIMUM QUALIFICATIONS:

Knowledge of

- Principles and practices of Public Information and Public Affairs including strategic messaging and communications, media relations, marketing, public relations, website and social media execution, legislation analysis, and special event planning
- Principles and practices of project and program administration

- Principles and practices of journalism and the media
- Principles and practices of marketing material concept development and execution
- Principles and practices of federal, state, and local legislative processes and government organizational structures
- Principles and techniques of effective oral presentations, public speaking, and written reports
- Supervisory principles, practices, and techniques, including employee development, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Applicable federal, state, and local laws, codes, regulations, and standards
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Administer Public Information, Legislative Affairs, and Public Affairs programs and activities in assigned area of responsibility
- Ability to identify, analyze, and develop a strategy to address legislative impacts to County operations
- Develop strategic messaging and communication materials
- Plan and respond appropriately to public information/affairs events, requests, and queries. Coordinating the preparation and publication of media, marketing, promotional, and/or communication materials
- Administer programs and projects
- Prioritize multiple competing work priorities and meeting deadlines
- Research and analyze data, formulate issues, and articulating recommendations
- Monitor and interpret operational data, regulatory and financial information, and statistics
- Administer budgets and procurement processes, which may include negotiating contracts
- Develop and prepare reports, press releases, and presentations
- Recommend and implement policies and procedures
- Resolve conflict and facilitate consensus across multiple stakeholders

- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands and assigning/monitoring work, as assigned
- Interpret and apply applicable laws, codes, regulations, and standards
- Provide excellent customer service
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to effectively exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Public Information and Affairs Analyst or its equivalent with the County of Orange.

Or

Four (4) years of professional public information and affairs experience related to assignment.

A Bachelor's degree in communications, public relations, business administration, public administration, political science, or a related field may substitute for one (1) year of the required experience.

A Master's degree or higher in communications, public relations, business administration, public administration, political science, or a related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- Completion of Federal Emergency Management Administration (FEMA) Incident Command Structure (ICS) training modules
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



PUBLIC INFORMATION AND AFFAIRS MANAGER

Bargaining Unit: MA Administrative Management

Class Code:
8279MA

COUNTY OF ORANGE

Established Date: March 10, 2023

Revised Date: October 3, 2025

DEFINITION:

This class is the third in a six-level **Public Information and Affairs Management Series** responsible for supervising a program or work unit devoted to public information, or public affairs/legislative analysis. Incumbents supervise internal and external communications, analyze and develop legislative strategy and implementation, education and outreach initiatives, messaging and marketing initiatives, event coordination, and special events. Incumbents may serve on a department's executive team and/or participate in strategic and policy discussions

The Public Information and Affairs Management series includes the following:

Public Information and Affairs Analyst (8277MA)

Public Information and Affairs Administrator (8278MA)

Public Information and Affairs Manager (8279MA)

Public Information and Affairs Manager, Senior (8280MA)

Public Information and Affairs Assistant Deputy Director (8281MA)

Public Information and Affairs Deputy Director (8287MA)

CLASS CHARACTERISTICS:

Incumbents exercise supervisory authority over at least two (2) or more exempt or management staff and may manage multiple public information/public affairs small programs or a single large work unit or program. Decision-making includes using discretion for program decisions to achieve management objectives, with accompanying accountability for those decisions. An individual contributor who is a designated subject matter expert and who serves as a manager of a Countywide enterprise or highly technical and specialized function, without direct supervisory responsibilities may be assigned to this level.

As assigned, an incumbent supervises management and non-management level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Plans, coordinates, and evaluates Public Information, Legislative Affairs, and Public Affairs programs and/or projects; prepares and administers ongoing daily operations to comply with strategic goals and preferred outcomes; manages program planning and resource deployment; ensures compliance with all policies, procedures, quality, and performance standards.
2. Supervises the development and implementation of internal and external strategic messaging ensuring accurate and timely communications; oversees crisis communications and issues management; may serve as a media spokesperson or Public Information Officer (PIO); may oversee the administration of public records request responses.
3. Collaborates on the development and management of public information campaigns and/or legislative platform and strategy development; provides strategic oversight for assigned programmatic area, which may include websites, social media, and/or legislative initiatives; may facilitate the development and execution of special events.
4. Researches, analyzes, develops, reviews, edits, and disseminates original reports, press releases, key talking points, marketing collateral, communication plans, newsletters, digital content, agendas, articles, presentations, and other documents; reviews materials prepared by others; and develops and makes recommendations to higher-level staff.
5. Responds to highly visible inquiries from and/or coordinates activities with County staff, the media, legislators, the general public, external agencies and/or other stakeholders; and convenes, facilitates, and/or attends meetings, events, and press conferences.
6. Establishes internal and external partnerships; coordinates with County staff, the media, legislators, vendors, community organizations, tenants, the general public, external agencies, and/or other stakeholders.
7. Supervises professional, paraprofessional, and support level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
8. Manages procurements and budgets for assigned programs; monitors and approves inventory and procurement processes; prepares and reviews budget requests; researches and reviews funding opportunities; collects and analyzes financial information; and makes budgetary and financial recommendations to higher-level staff.
9. Performs other duties of a similar nature and level.

MINIMUM QUALIFICATIONS:

Knowledge of

- Principles and practices of Public Information and Public Affairs including strategic messaging and communications, media relations, marketing, public relations, website and social media execution, legislation analysis, and special event planning
- Principles and practices of program planning and administration
- Principles and practices of journalism and the media

- Practices related to legislative strategy and advocacy
- Principles and practices of marketing material concept development and execution
- Principles and practices of federal, state, and local legislative processes and government organizational structures
- Principles and practices of modern business management and strategy development
- Project and contract management principles
- Principles and practices of conflict resolution
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles and techniques of effective public speaking, oral presentations, and written reports
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, regulations and standards
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Administer Public Information, Legislative Affairs, and Public Affairs programs and activities in assigned area of responsibility
- Develop strategic messaging and communication materials
- Plan and respond appropriately to public information/affairs events, requests, and queries
- Coordinate the preparation and publication of media, marketing, promotional, and/or communication materials
- Oversee adherence to quality assurance and standards
- Compile and analyze data, formulate issues, and articulate recommendations
- Author and prepare original reports, press releases, content, documents, and presentations
- Recommend, develop, and implement policies and procedures
- Facilitate groups and building consensus using persuasive reasoning
- Exercise political acumen, tact, and diplomacy

- Interpret and apply applicable laws, codes, regulations, and standards
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Public Information and Affairs Administrator or two (2) years of experience as a Public Information and Affairs Analyst or its equivalent with the County of Orange.

Or

Five (5) years of professional public information, legislative affairs, or public affairs experience related to assignment; must include one (1) year of lead/supervisory experience.

A Bachelor's degree in communications, public relations, business administration, public administration, political science, or a related field may substitute for one (1) year of the required experience.

A Master's degree or higher in communications, public relations, business administration, public administration, political science, or a related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- Successful completion of Federal Emergency Management Agency Incident Management System training modules
- A valid California Driver's License with a satisfactory driving record as determined by the County
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders

repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



**PUBLIC INFORMATION AND AFFAIRS
MANAGER, SENIOR**

Bargaining Unit: MA Administrative Management

Class Code:
8280MA

COUNTY OF ORANGE

Established Date: March 10, 2023

Revised Date: October 3, 2025

DEFINITION:

This class is the fourth in a six-level **Public Information and Affairs Management Series** responsible for managing multiple teams or units devoted to public information, or public affairs/legislative analysis. Incumbents supervise internal and external communications, messaging and marketing initiatives, event coordination, and special events.

The Public Information and Affairs Management series includes the following:

Public Information and Affairs Analyst (8277MA)
Public Information and Affairs Administrator (8278MA)
Public Information and Affairs Manager (8279MA)
Public Information and Affairs Manager, Senior (8280MA)
Public Information and Affairs Assistant Deputy Director (8281MA)
Public Information and Affairs Deputy Director (8287MA)

CLASS CHARACTERISTICS:

Incumbents oversee multiple, highly complex public information/public affairs functions and provide first-level (direct) supervision to multiple management level employees. Decision-making includes using discretion for program decisions to achieve management objectives, with accompanying accountability for those decisions. Decision-making includes establishing work unit objectives and goals, exercising considerable discretion in selecting the method to address a problem or issue, and fostering collaboration among and between the work units supervised as well with work units under the direction of others.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Provides operational and technical management and direction to staff assigned to Public Information, Legislative Affairs, and Public Affairs programs and/or projects; prepares and administers ongoing daily

operations to comply with strategic goals and preferred outcomes; and ensures compliance with all policies, procedures, quality, and performance standards.

2. Oversees the implementation of internal and external strategic messaging ensuring accurate and timely communications; oversees crisis communications and issues management; and may oversee the administration of public records request responses.
3. Researches, analyzes, develops, reviews, edits, and disseminates original reports, press releases, key talking points, marketing collateral, communication plans, newsletters, digital content, agendas, articles, presentations, and other documents; reviews materials prepared by others; and develops and makes recommendations to higher-level staff.
4. Responds to inquiries from and/or coordinates activities with County staff, the media, legislators, the general public, external agencies and/or other stakeholders; and convenes, facilitates, and/or attends meetings, events, and press conferences.
5. Establishes and maintains internal and external partnerships; coordinates with County staff, the media, legislators, vendors, community organizations, tenants, the general public, external agencies, and/or other stakeholders.
6. Supervises professional, paraprofessional, and support level staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.
7. Troubleshoots and resolves program or work unit issues and keeps higher-level management informed of issues/resolution.
8. Performs other duties of a similar nature and level.

MINIMUM QUALIFICATIONS:

Knowledge of

- Principles and practices of Public Information and Public Affairs including strategic messaging and communications, media relations, marketing, public relations, website and social media execution, legislation analysis, and special event planning
- Principles and practices of program planning and administration
- Principles and practices of journalism and the media
- Practices related to legislative strategy and advocacy
- Principles and practices of marketing material concept development and execution
- Principles and practices of federal, state, and local legislative processes and government organizational structures
- Project and contract management principles
- Principles and practices of conflict resolution

- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles and techniques of effective public speaking, oral presentations, and written reports
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, regulations and standards
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Manage Public Information, Legislative Affairs, and Public Affairs programs and activities in assigned area of responsibility
- Develop strategic messaging and communication materials
- Respond appropriately to public information/affairs events, requests, and queries
- Coordinate the preparation and publication of media, marketing, promotional, and/or communication materials
- Oversee adherence to quality assurance and standards
- Compile and analyze data, formulate issues, and articulate recommendations
- Author and prepare original reports, press releases, content, documents, and presentations
- Recommend, develop, and implement policies and procedures
- Facilitate groups and building consensus using persuasive reasoning
- Exercise political acumen, tact, and diplomacy
- Interpret and apply applicable laws, codes, regulations, and standards
- Supervise and evaluate staff performance, including training and coaching staff, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Utilize a computer and relevant software applications
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Public Information and Affairs Manager or two (2) years of experience as a Public Information and Affairs Administrator or its equivalent with the County of Orange.

Or

Five (5) years of professional public information, legislative affairs, or public affairs experience related to assignment; must include two (2) years of lead/supervisory experience.

A Bachelor's degree in communications, public relations, business administration, public administration, political science, or a related field may substitute for one (1) year of the required experience.

A Master's degree or higher in communications, public relations, business administration, public administration, political science, or a related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- Successful completion of Federal Emergency Management Agency Incident Management System training modules
- A valid California Driver's License with a satisfactory driving record as determined by the County
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



**PUBLIC INFORMATION AND AFFAIRS ASSISTANT
DEPUTY DIRECTOR**

Bargaining Unit: MA Administrative Management

Class Code:
8281MA

COUNTY OF ORANGE

Established Date: March 10, 2023

Revised Date: October 3, 2025

DEFINITION:

This class is the fifth in a six-level **Public Information and Affairs Management Series** responsible for overseeing the County's federal and state legislative affairs initiatives or communications and public affairs functions. Incumbents serve as an assistant to a Deputy Director with responsibilities for department-wide management of public information, legislative affairs and/or public affairs work, and may serve as part of the Executive Team.

The Public Information and Affairs Management series includes the following:

Public Information and Affairs Analyst (8277MA)

Public Information and Affairs Administrator (8278MA)

Public Information and Affairs Manager (8279MA)

Public Information and Affairs Manager, Senior (8280MA)

Public Information and Affairs Assistant Deputy Director (8281MA)

Public Information and Affairs Deputy Director (8287MA)

CLASS CHARACTERISTICS:

Incumbents serve as second- or third-level supervisors for public information/public affairs functions with one (1) or more manager level direct reports. Work involves serving in the absence of the Deputy Director, ensuring management consistency across multiple highly complex units and providing (direct) supervision to senior managers, as well as indirect supervision to additional management and/or non-management level employees. Decision-making includes assisting the Deputy Director with establishing strategic goals and ensuring operational goals are executed in support of those goals. Incumbents exercise considerable discretion in selecting the method to address a problem or issue, and are responsible for establishing work standards, policies, and procedures and fostering collaboration across the assigned organizational function.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Develops, implements, and evaluates, legislative affairs, communications, and/or public affairs services, programs, large-scale projects, and operations. Directs contracts to implement high level events and communications strategies.
2. Monitors and analyzes current and potential changes to state and federal legislation and the possible impact of the changes on the County and/or assigned area of responsibility; makes recommendations pertaining to policy and legislation; and/or monitors the enforcement of settlement agreements. Meets regularly with members of both the State and Federal delegations and manages our countywide lobbyist contracts at the state and federal levels.
3. Directs the development and implementation of strategic communication plans; oversees department media relations, public relations, and advertising campaigns; and directs frontline customer relations activities.
4. Plans and evaluates system-wide procedures, policies, strategies, and goals; maintains, updates, and ensures procedural compliance for programs and projects; and plans and implements process improvements.
5. Develops, administers, and oversees budgets; oversees procurement activities; reviews and approves budget requests and transactions; researches and analyzes financial information; makes resource allocation decisions and recommendations; and ensures adherence to budgetary and other applicable requirements, policies, and procedures.
6. Oversees the preparation of and/or prepares, reviews, designs, approves, and/or maintains reports, briefings, Board communications and/or Agenda Staff Reports, presentations, press releases, advertising campaigns, articles, website content, social media posts, records, plans, contracts, and other materials; coordinates the research and analysis of department-wide policy and related information; and makes recommendations to higher-level staff.
7. Oversees and conducts performance evaluations, employee development, hiring, discipline, and termination procedures as well as directly supervises management, professional, paraprofessional, and support staff.
8. Coordinates with and convenes, facilitates and/or attends meetings, briefings, and presentations with County officials, County staff, boards, commissions, trade organizations, the public, community groups, elected officials, County contract lobbyists, external agencies and/or other stakeholders; develops internal and external partnerships; responds to escalated complaints and operational issues; and manages ongoing program operations and processes.
9. Performs other duties of a similar nature and level.

MINIMUM QUALIFICATIONS:

Knowledge of

- Advanced principles and practices of Public Information and Public Affairs and/or legislative processes
- Government organizational structures

- Principles and practices of developing and executing legislative and/or communications strategies, campaigns, and materials
- Principles and practices of modern business management and strategy development
- Principles and practices of budgeting and fiscal management including fund accounting
- Principles and practices of program planning and administration
- Principles and practices of group facilitation and building consensus
- Project and contract management principle
- Principles and applications of critical thinking and analyzing
- Principles and techniques of effective oral presentations
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, regulations, and standards
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles in providing customer service
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment

Ability to

- Plan and manage Public Information and Affairs services related to legislative affairs, communications, and/or public affairs
- Identify, analyze, develop and implement strategies to address legislative impacts to County operations
- Plan and respond appropriately to legislative and media events, requests, and queries
- Monitor the development and execution of marketing strategies, campaigns, materials, websites, and social media content
- Identify strategic objectives, ensuring ongoing compliance, and measuring performance
- Manage budgets and allocate resources to achieve strategic objectives
- Interpret, monitor, and report financial information and statistics

- Monitor and direct procurement activities
- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Review research and implementing industry trends, solutions, and best practices
- Author and oversee the preparation of original reports, content, documents, and presentations
- Make presentations to stakeholders, boards, elected officials, and County leadership in a variety of settings, including in the office, at a Board meeting, at a public meeting, or testifying before the legislature
- Develop and implement policies and procedures
- Facilitate group discussions and building consensus using persuasive reasoning
- Exercise political acumen, tact, and diplomacy
- Collaborate with program stakeholders, coalition, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Supervise and evaluate staff performance, training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Provide customer service and resolve escalated issues
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Public Information and Affairs Manager, Senior or two (2) years of experience as a Public Information and Affairs Manager or its equivalent with the County of Orange.

Or

Five (5) year of public information or public affairs management experience related to assignment; must include one (1) year of supervisory experience.

A Bachelor's degree in communications, public relations, business administration, public administration, political science, or a related field may substitute for one (1) year of the required experience.

A Master's degree or higher in communications, public relations, business administration, public administration, political science, or a related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- Completion of Federal Emergency Management Administration (FEMA) Incident Command Structure (ICS) training modules
- Possession of a valid California Driver's license, Class C or higher

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***Physical and Mental Requirements***

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



**PUBLIC INFORMATION AND AFFAIRS DEPUTY
DIRECTOR**

Bargaining Unit: MA Administrative Management

Class Code:
8287MA

COUNTY OF ORANGE

Established Date: October 3, 2025

DEFINITION:

This class is the sixth in a six-level **Public Information and Affairs Management Series** responsible for overseeing the County's federal and state legislative affairs initiatives, communications, and public affairs function. Incumbent serves as a principal advisor to the Chief Operating Officer with responsibilities for department-wide management of public information, legislative affairs and/or public affairs work, and may serve as part of the County Executive Office's Executive Team.

The Public Information and Affairs Management series includes the following:

Public Information and Affairs Analyst (8277MA)
Public Information and Affairs Administrator (8278MA)
Public Information and Affairs Manager (8279MA)
Public Information and Affairs Manager, Senior (8280MA)
Public Information and Affairs Assistant Deputy Director (8281MA)
Public Information and Affairs Deputy Director (8287MA)

CLASS CHARACTERISTICS:

Incumbent oversees the County Executive Office's public information/public affairs and government affairs functions and is responsible for strategically developing, administering, and promoting all County communication and legislative affairs activities. Work involves ensuring management consistency across multiple highly complex units and providing direct supervision to one (1) or more senior managers, as well as indirect supervision to additional management and/or non-management level employees. Decision-making includes establishing strategic goals and ensuring operational goals are executed in support of those goals. Incumbents exercise considerable discretion in selecting the method to address a problem or issue, and are responsible for establishing work standards, policies, and procedures and fostering collaboration across the assigned organizational function.

An incumbent oversees the supervision of management and non-management staff, as well as directly supervises management staff including conducting performance evaluations, coordinating training, and implementing hiring, discipline, and termination procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Plans, directs, organizes, and coordinates the overall activities of the County's legislative affairs, communications, community relations, and/or public affairs services, programs, large-scale projects, and operations; works with and advises the Board of Supervisors and Chief Executives on strategic planning for legislative advocacy, governmental communications, and communications strategies.
2. Directs the development and implementation of governmental and legislative affairs programs and processes; develops policy recommendations or options for the Board of Supervisors in conjunction with County-contracted lobbyists, elected and appointed governmental officials, and civic and industry leaders on major intergovernmental issues and strategies.
3. Directs the development and implementation of strategic communication plans; oversees department media relations, public relations, and advertising campaigns; and directs frontline customer relations activities.
4. Plans and evaluates system-wide procedures, policies, strategies, and goals; maintains, updates, and ensures procedural compliance for programs and projects; and plans and implements process improvements.
5. Establishes and maintains strategic relations with management, elected officials, employee representatives, key stakeholders, and the public representing diverse cultures and backgrounds.
6. Develops, administers, and oversees budgets; oversees procurement activities; reviews and approves budget requests and transactions; researches and analyzes financial information; makes resource allocation decisions and recommendations; and ensures adherence to budgetary and other applicable requirements, policies, and procedures.
7. Oversees the preparation of and/or prepares, reviews, designs, approves, and/or maintains reports, briefings, strategy memos, Board communications and/or Agenda Staff Reports, presentations, press releases, advertising campaigns, articles, website content, social media posts, records, plans, contracts, and other materials; coordinates the research and analysis of department-wide policy and related information; and makes recommendations to higher-level staff.
8. Oversees and conducts performance evaluations, employee development, hiring, discipline, and termination procedures as well as directly supervises management, professional, paraprofessional, and support staff.
9. Coordinates with and convenes, facilitates and/or attends meetings, briefings, and presentations with County officials, County staff, boards, commissions, trade organizations, the public, community groups, elected officials, County contract lobbyists, external agencies and/or other stakeholders; develops internal and external partnerships; responds to escalated complaints and operational issues; and manages ongoing program operations and processes.
10. Performs other duties of a similar nature and level.

MINIMUM QUALIFICATIONS:

Knowledge of

- Advanced principles and practices of Public Information and Public Affairs and/or legislative processes
- Government organizational structures
- Principles and practices of developing and executing legislative, communications strategies, campaigns, and materials as well as strategic community relations.
- Principles and practices of modern business management and strategy development
- Principles and practices of budgeting and fiscal management
- Principles and practices of program planning and administration
- Principles and practices of group facilitation and building consensus
- Project and contract management principle
- Principles and applications of critical thinking and analyzing
- Principles and techniques of effective oral presentations
- Principles and practices of conflict resolution and negotiation strategies
- Applicable federal, state, and local laws, codes, regulations, standards, and processes
- Managerial principles, practices, and techniques, including training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Principles in providing customer service
- Modern office technology and operational specific business systems, equipment, and applications relevant to area of assignment
- Principles and practices of political savvy

Ability to

- Plan and manage Public Information and Affairs services related to legislative affairs, communications, and/or public affairs
- Identify, analyze, develop and implement strategies to address legislative impacts to County operations
- Plan and respond appropriately to legislative and media events, requests, and queries
- Monitor the development and execution of marketing strategies, campaigns, materials, websites, and social media content
- Identify strategic objectives, ensuring ongoing compliance, and measuring performance
- Manage budgets and allocate resources to achieve strategic objectives

- Interpret, monitor, and report financial information and statistics
- Monitor and direct procurement activities
- Oversee the implementation of, and adherence to, quality assurance activities and standards
- Review research and implementing industry trends, solutions, and best practices
- Author and oversee the preparation of original reports, content, documents, and presentations
- Make presentations to stakeholders, boards, elected officials, and County leadership in a variety of settings, including in the office, at a Board meeting, at a public meeting, or testifying before the legislature
- Develop and implement policies and procedures
- Facilitate group discussions and building consensus using persuasive reasoning
- Exercise political acumen, tact, and diplomacy
- Collaborate with program stakeholders, coalition, elected and appointed boards, the public, and internal leadership
- Interpret and apply applicable laws, codes, regulations, and standards
- Supervise and evaluate staff performance, training, coaching, coordinating deadlines, prioritizing work demands, and assigning/monitoring work
- Provide customer service and resolve escalated issues
- Utilize a computer and relevant software applications, specialized equipment, and systems
- Utilize communication and interpersonal skills as applied to interactions with coworkers, supervisors, the general public, and others to sufficiently exchange or convey information and to receive work direction

Education and Experience

One (1) year of experience as a Public Information and Affairs Assistant Deputy Director or two (2) years of experience as a Public Information and Affairs Manager, Senior or its equivalent with the County of Orange.

Or

Six (6) year of public information or public affairs management experience related to assignment; must include two (2) year of supervisory experience.

A Bachelor's degree in communications, public relations, business administration, public administration, political science, or a related field may substitute for one (1) year of the required experience.

A Master's degree or higher in communications, public relations, business administration, public administration, political science, or a related field may substitute for two (2) years of the required experience.

License/Certification

Some assignments may require one or more of the following licenses or certifications by date of application/date of appointment:

- Completion of Federal Emergency Management Administration (FEMA) Incident Command Structure (ICS) training modules

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess vision sufficient to read standard text and a computer monitor and to drive a vehicle; speak and hear well enough to communicate clearly and understandably in person to individuals and groups and over the telephone; possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment; possess manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a keyboard, utilize office equipment and to write and drive; use a County approved means of transportation.

Environmental and Working Conditions

Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions.

Function effectively in a standard office environment.



ASSISTANT RESEARCH ANALYST

Bargaining Unit: GE General

Class Code:
8373GE

COUNTY OF ORANGE

Established Date: October 23,
1973

Revision Date: October 3,
2025

DEFINITION:

Under close supervision, assists in conducting evaluation projects, applied research projects, and/or case studies to assess the effectiveness and needs of various County programs and services. Collects, compiles, and analyzes data, summarizes findings, and prepares basic reports; and to do other work as required.

The Research Analyst series includes the following:

Assistant Research Analyst (8373GE)
Research Analyst (8371GE)
Senior Research Analyst (8374GE)
Supervising Research Analyst (8372SM)

CLASS CHARACTERISTICS:

This is the entry level in the Research Analyst series. Under close supervision, positions in this class typically collect and organize data using questionnaires, interviews, and other evaluation tools developed by higher level Research Analysts, or compile and summarize statistical information. This position does not typically design or manage entire evaluation projects. Routine assignments may be performed with greater independence after experience is gained.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Assists in collecting, reviewing, and compiling data from field data, records, interviews, surveys, and other sources.
2. Checks and verifies data for accuracy, consistency, and completeness, flags errors or discrepancies for review.

3. Supports the development, testing, and refinement of survey instruments, data collection forms, and procedural manuals.
4. Performs routine descriptive statistical and basic geospatial (GIS) analysis using established methods to identify trends, correlations, and inconsistencies in data.
5. Verifies and validates data by cross-referencing with official records or consulting with program staff and subject matter experts.
6. Summarizes findings and prepares draft narrative reports, charts, and tables for review by higher-level analysts or supervisor.
7. Provides support in preparing presentation materials, handouts, or reports for use by departments and leadership.
8. Conducts interviews, including those involving sensitive or confidential data, following prescribed interview procedures.
9. Ensures appropriate research methods and quality controls are used in data collection.
10. Communicates potential limitations to data quality or completeness that may impact results or findings.
11. May assist in instructing or guiding program staff in data collection procedures and proper use of forms and tools.
12. May coordinate the work of clerical staff involved in transcribing, entering, organizing, or tabulating data.

MINIMUM QUALIFICATIONS:

Some Knowledge of

- Principles and methods of evaluation, quality improvement and sampling frameworks for applied research and program assessment
- Basic principles of descriptive statistics and data summarization techniques used to interpret patterns and trends in data
- Methods of organizing data and findings into reports, tables, charts and graphs
- Principles and practices relevant to the professional or technical field associated with County programs, such as social services, public health, urban systems, or criminal/juvenile justice systems
- Techniques for data aggregation, cleaning, formatting, and processing large datasets
- Programming tools or software to support applied research, survey data collection, statistical summaries, and evaluation activities

Ability to

- Apply principles of logic and basic evaluation techniques to define problems, collect data, establish facts, and draw valid conclusions
- Assist in organizing efficient plans for collecting and summarizing different types of data (i.e., qualitative, quantitative)
- Perform quality assurance checks to ensure accuracy, completeness, and consistency of data
- Read and understand specialized information and terminology in technical or professional fields relevant to the area of assignment
- Read and understand complex technical information including data tables, charts and graphs
- Communicate data collection procedures to stakeholders without technical backgrounds
- Learn to plan and organize research and evaluation activities to meet specific program and service needs
- Speak and write clearly, concisely and logically
- Conduct interviews following standard protocol and employ tact when obtaining sensitive and personal information
- Establish and maintain cooperative relationships with colleagues, leadership, external partners, clients and customers
- Initiate, plan and complete work assignments with close supervision and guidance
- Performs quality assurance checks to ensure accuracy, completeness, and consistency of data
- Assist in programming of electronic surveys (e.g., Microsoft Forms, Survey Monkey, Qualtrics, etc.)
- Follow County data reporting policies and information security practices

Education and Experience

One (1) year of experience performing research support duties such as collecting data, conducting interviews or surveys, or preparing statistical summaries.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment. Frequent sitting, standing and walking for extended periods. Ability to reach, push, pull and bend on an infrequent basis. Possess vision sufficient to read standard text and a computer monitor. Ability to speak and hear well enough in a moderately noisy office environment to communicate clearly and understandably in person, over the telephone or virtual meetings and in small groups. Possess manual dexterity sufficient to use hands, arms, and shoulders repetitively to write and use a computer, keyboard and mouse, and use office equipment on a frequent to constant basis.

Environmental and Working Conditions

Work is typically performed in an indoor office environment. Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions. May have exposure to firearms from working near law enforcement professionals.

Function effectively in a standard office environment.



COUNTY OF ORANGE
 Established Date: August 1,
 1972
 Revision Date: October 3,
 2025

RESEARCH ANALYST

Bargaining Unit: GE General

Class Code:
 8371GE

DEFINITION:

Under general supervision, plans, organizes and conducts evaluation, quality improvement and/or applied research projects or case studies to assess the effectiveness and needs of various County programs and services. Collects, analyzes, and interprets data, and identifies limitations in data quality or completeness that may impact interpretation and conclusions drawn from the data. Develops findings and recommendations to support department efforts in the areas of program implementation, quality or operational improvement, policy development, and/or decision-making. Performs related duties as required.

The Research Analyst series includes the following:

Assistant Research Analyst (8373GE)
 Research Analyst (8371GE)
 Senior Research Analyst (8374GE)
 Supervising Research Analyst (8372SM)

CLASS CHARACTERISTICS:

Position at this level perform journey-level program evaluation, quality improvement, applied research, case studies, and statistical analysis under general supervision. This class is responsible for planning, organizing, and completing projects of moderate scope and complexity. Work is reviewed by a Supervising Research Analyst or higher-level staff to ensure accuracy, mitigate potential risks, and align with program objectives. This class is distinguished from the Senior Research Analyst, which operates at the advanced journey level with greater independence and lead projects of significant scope or program impact, such as those involving multiple programs or departments.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Designs, quantitative, qualitative or mixed method strategies for applied research, evaluation and/or case study projects that align with department projects, services, initiatives, and other efforts.
2. Consults with supervisor, program managers and staff to clarify project objectives, scope, and methodology, and to provide recommendations for evidence-based decision-making.
3. Reviews technical publications, evaluation studies, and other appropriate resources to recommend evidence-based methods and ensure alignment with best practices in areas such as public health, behavioral health, social services, real property economics, urban systems, or criminal and juvenile justice systems.
4. Selects and applies appropriate statistical and analytical techniques to evaluate program outcomes, service utilization, community needs or similar data sets.
5. Identifies relevant populations and outreach methods for the project, and develops data collection tools such as questionnaires, surveys, and sample procedures.
6. Collects, compiles, and validates data from appropriate primary and secondary sources, including field data, administrative records, and databases.
7. Applies basic geospatial analysis techniques using established methods to visualize, interpret, and analyze spatial patterns and relationships in program data (e.g., mapping public health trends, crime patterns, crime maps, or program service coverage) using Geographic Information Systems (GIS) software.
8. Conducts program-focused analyses to identify trends, gaps, and areas for quality improvement.
9. Prepares summary findings using software tools such as MS Excel, MS Access, SPSS, SAS, R, ArcGIS, CAD, RMS, DOJ systems, and other applications.
10. Coordinates with technical staff to ensure data systems and reporting tools capture information necessary for evaluation, decision-making, and feedback to support the design or improvement of databases, dashboards, or applications used to manage and analyze program data.
11. Drafts evaluation and applied research reports including narrative analysis, conclusions, and actionable recommendations; develops charts, graphs, tables, and infographics to communicate and present findings to stakeholders.
12. May provide technical guidance and quality control to entry Research Analysts, program staff, and/or clerical staff on a project basis; ensures timely completion of project deliverables.
13. Some assignments may assist in compiling, transmitting, or relating investigative information to prosecutors or law enforcement personnel in support of active cases or field operations.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Principles and methods of program evaluation, quality improvement, and sampling frameworks for applied research and program assessment
- Methods of organizing data and findings into reports, tables, charts, graphs, and visual dashboards

General Knowledge of

- Principles and methods of descriptive statistics and data summarization on techniques used to interpret patterns and trends in data
- Principles and practices of a, professional or technical field as they apply to a particular County program, depending on area of assignment, such as, but not limited to, social welfare, public health, behavioral health, urban systems and public facilities analysis, or criminal/juvenile justice systems
- Methods and techniques for collecting, cleaning, and preparing data from administrative records, surveys, and other program data sources
- Software tools used to analyze and visualize data (e.g., Excel, Power BI, SPSS, R, SQL, and other applications)

Ability to

- Apply principles of logic and applied evaluation methods to define problems, collect and analyze data, establish facts and develop valid conclusions and recommendations
- Organize and collaborate on developing an efficient plan for collecting and summarizing different types of data (i.e., qualitative, quantitative)
- Apply appropriate formula or method to summarize data from program evaluations, administrative records, and other sources
- Read and understand specialized information and terminology in a particular professional or technical field, relevant to area of assignment
- Read, interpret, and apply complex technical information, including statistical outputs, data tables, charts and graphs
- Plan and organize applied research, evaluation, and statistical analysis projects to meet specific needs of a County program or service, depending on area of assignment
- Speak and write clearly, concisely and logically
- Communicate data collection procedures to stakeholders without technical backgrounds
- Conduct interviews and/or assist with focus groups following a standard protocol, and employ tact when obtaining sensitive and personal information
- Establish and maintain cooperative relationships with colleagues, leadership, external partners, clients and customers

- Initiate, plan and complete work assignments with general supervision
- Performs quality assurance checks to ensure accuracy, completeness, and consistency of data
- Program electronic surveys (e.g., Microsoft Forms, Survey Monkey, Qualtrics, etc.)
- Follow County data reporting policies and information security practices

Education and Experience

One (1) year of experience in the Orange County class of Assistant Research Analyst.

Or

A bachelor's degree from an accredited college or university in a field such as Statistics, Social Sciences, Public Administration, Public Health, Psychology, Criminal Justice, Urban Planning, Economics, or a closely related field that included coursework in research methods, statistical analysis, program evaluation, or quantitative or qualitative research design.

And

Three (3) years of professional experience conducting applied research, including developing methodologies, performing statistical analysis using software tools (e.g., SPSS, R, SAS, or similar), interpreting results, and preparing reports or presentations to support program or policy decisions.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment. Frequent sitting, standing and walking for extended periods. Ability to reach, push, pull and bend on an infrequent basis. Possess vision sufficient to read standard text and a computer monitor. Ability to speak and hear well enough in a moderately noisy office environment to communicate clearly and understandably in person, over the telephone or virtual meetings and in small groups. Possess manual dexterity sufficient to use hands, arms, and shoulders repetitively to write and use a computer, keyboard and mouse, and use office equipment on a frequent to constant basis.

Environmental and Working Conditions

Work is typically performed in an indoor office environment. Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy

and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions. May have exposure to firearms from working near law enforcement professionals.

Function effectively in a standard office environment.



COUNTY OF ORANGE

Established Date: February 1,
1985

Revision Date: October 3,
2025

SENIOR RESEARCH ANALYST

Bargaining Unit: GE General

Class Code:
8374GE

DEFINITION:

Under direction, to plan, organize and leads evaluation, quality improvement and/or applied research projects or case studies that are of significant scope, diversity, and policy impact, to assess the effectiveness, outcomes, and needs of County programs. Select and apply appropriate case study, analytical strategies, and/or and statistical methods to evaluate program effectiveness or outcomes. Identifies limitations in data quality or completeness that may impact interpretation and conclusions drawn from data. Provide recommendations to management in the areas of program implementation, quality, or operational improvement, policy development, and/or decision-making. Act in a lead capacity over the work of lower-level analysts and other staff on assigned projects. Perform other related duties as required.

The Research Analyst series includes the following:

Assistant Research Analyst (8373GE)

Research Analyst (8371GE)

Senior Research Analyst (8374GE)

Supervising Research Analyst (8372SM)

CLASS CHARACTERISTICS:

This is the advanced journey-level in the Research Analyst series. Positions at this level perform advanced program evaluation, quality improvement, applied research, case studies, and analytical projects that require selection or development of tailored methodologies to evaluate program effectiveness, outcomes, and needs with minimal technical supervision. Projects may address specialized subject areas such as behavioral health, public health, social services, urban systems, or criminal and juvenile justice systems. Incumbents independently develop and lead major projects, determine appropriate analytical or statistical approaches, interpret results, and develop data-driven recommendations that inform high-impact policy, operational, or financial decisions. This level may also serve as a lead and resource to other Research Analysts and departmental staff.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Plan, organizes, and oversees evaluation, quality improvement, applied or field research, and/or case study projects that assess the effectiveness, impact, and need for County programs and services, including establishing project objectives, feasibility, timelines and milestones.
2. Designs and applies quantitative, qualitative or mixed method strategies for evaluation, quality improvement, applied or field research, and/or case study projects that follow best practices.
3. Selects and applies appropriate statistical techniques to evaluate program outcomes, service utilization, and/or community needs.
4. Develops and maintains standardized methods and procedures and ensures consistency across projects.
5. Develops or selects valid and reliable data collection tools and procedures (e.g., surveys, questionnaires, forms, interviews, etc.) to ensure accuracy, reliability, and alignment with departmental initiatives and operational needs.
6. Advises on project scope, methods, data collection tools, project population and analytical approach to be used in the proposed projects and ensures alignment with departmental goals and initiatives.
7. Gathers, reviews and evaluates technical publications, professional literature, evaluation reports, and other subject-matter resources (e.g., behavioral health, public health, social services, economics, urban planning, criminal and juvenile justice) to inform the development of evidence-based project methodologies.
8. Plans, organizes, and develops final reports, including findings, recommendations, narrative summaries, charts, graphs, and tables.
9. Serves as a lead on broad-scope projects and provide technical guidance, quality control, and training to lower-level Research Analysts, program staff, and clerical staff on data collection, evaluation methods, and analytical procedures.
10. Collaborates with Data Scientists and IT staff to define or modify information system or database requirements and modifies datafiles that populate dashboards or visualization tools that support evaluation and program needs.
11. Leads assigned evaluation and applied research projects based on program and management needs, often without direct assignment from a supervisor.
12. Ensures compliance with federal, state, and local laws and regulations governing law enforcement data privacy and information sharing.
13. Prepares and delivers presentations on analytics results, trends, and recommendations, including program evaluation findings, crime or intelligence analysis, and other subject-matter projects, to management, prosecutors, investigators, and stakeholders.
14. Develops training materials and trains lower-level staff on data collection and/or interview procedures, including but not limited to field-based interviews, surveys, file review, etc.
15. May coordinates and oversee field data collection by program staff, technical staff, and/or clerical staff.

16. Some assignments may apply geospatial analysis techniques using established methods to analyze, evaluate, and interpret spatial patterns and relationships in program and community data (e.g., mapping public health trends, crime patterns, crime maps, or program service coverage) using Geographic Information Systems (GIS) software.
17. Some assignments may lead or coordinate the analysis and dissemination of investigative or intelligence-related data to support high-profile cases, field operations, or inter-agency initiatives; prepares and presents reports and presentations to prosecutors, investigators, or command staff on patterns, and trends.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Principles and methods of applied research and evaluation, including sampling and evaluation frameworks for applied research, high-impact program and outcome assessment
- Principles and methods of descriptive statistics and data summarization techniques used to interpret patterns and trends in data, as well as methods of calculating reliability and validity, and plotting and analyzing of run charts and control charts
- Methods of organizing data and findings into reports, tables, charts and graphs and visual dashboards
- Principles and practices of a professional or technical field as they apply to County programs, depending on area of assignment, such as, but not limited to, social welfare, public health, behavioral health urban systems and public facilities analysis, supervision of probationers or administration of juvenile institutions
- Methods and techniques for collecting, cleaning, preparing from administrative records, surveys, and other program data sources
- Software tools used to analyze and visualize data (e.g., Excel, Power BI, SPSS, R, SQL, and other applications)

Ability to

- Apply principles of logic and applied research methodologies to define problems, analyze variables, collect and interpret data, establish facts, and draw valid conclusions and recommendations
- Apply appropriate statistical methods and formulas to summarize and draw valid conclusions using data that may be incomplete
- Read, interpret, and apply specialized information and terminology from professional or technical fields relevant to the area of assignment
- Read, interpret, and apply complex technical and statistical information, including data tables, charts, graphs, or other analytical displays
- Plan and organize applied research, evaluation, and statistical analysis projects to meet specific needs of a County program or service

- Communicate verbally or in writing, methods of data collection to stakeholders without technical expertise
- Prepare and present oral and written findings and recommendations
- Conduct interviews and/or focus groups following a standard protocol, and employ tact when obtaining sensitive and personal information
- Establish and maintain cooperative relationships with colleagues, leadership, external partners, clients and customers
- Initiate, plan and complete work assignments with minimal supervision
- Develop and perform quality assurance checks to ensure accuracy, completeness, and consistency of data
- Program electronic surveys (e.g., Microsoft Forms, Survey Monkey, Qualtrics, etc.)
- Identify appropriate, validated survey measures or develop questionnaires using best practices for survey design and construction
- Ensure compliance of County data reporting policies and information security practices

Education and Experience

One (1) year of experience in the Orange County class of Research Analyst.

Or

A bachelor's degree from an accredited college or university in a field such as Statistics, Social Sciences, Public Administration, Public Health, Psychology, Criminal Justice, Urban Planning, Economics, or a closely related field that included coursework in research methods, statistical analysis, program evaluation, or quantitative or qualitative research design.

And

Four (4) years of progressive professional experience in applied research, evaluation, or statistical analysis, including responsibility for leading projects or project teams.

A master's degree from an accredited college or university in a field such as Statistics, Social Sciences, Public Administration, Public Health, Criminal Justice, Urban Planning, Economics, or a similar field of study that includes graduate-level coursework in research methods, statistical analysis, or research design may substitute for one (1) year of the required experience.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***Physical and Mental Requirements***

Possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment. Frequent standing and walking for extended periods. Ability to reach, push, pull and bend on an infrequent basis. Possess vision sufficient to read standard text and a computer monitor. Ability to speak and hear well enough in a moderately noisy office environment to communicate clearly and understandably in person, over the telephone or virtual meetings and in small groups. Possess manual dexterity sufficient to use hands, arms, and shoulders repetitively to write and use a computer, keyboard and mouse, and use office equipment on a frequent to constant basis.

Environmental and Working Conditions

Work is typically performed in an indoor office environment. Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions. May have exposure to firearms from working near law enforcement professionals.

Function effectively in a standard office environment.



SUPERVISING RESEARCH ANALYST

Bargaining Unit: SM Supervisory Management

Class Code:
8372SM

COUNTY OF ORANGE

Established Date: February 1,
1985

Revision Date: October 3,
2025

DEFINITION:

Under general direction, to supervise and coordinate the development, planning and execution of evaluation, quality improvement, applied research, and/or case studies, that are of significant scope, diversity, and policy impact. Supervises the research program or unit of a department, ensuring best practices in evaluation practices, statistical methods, and case study strategies are followed by the team. May independently perform advanced analytical assignments or lead high-profile projects requiring specialized expertise. Provides recommendations to management in the areas of program implementation, quality or operational improvement, policy development, and/or decision-making. Performs other duties as required.

The Research Analyst series includes the following:

Assistant Research Analyst (8373GE)

Research	Analyst	(8371GE)
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Senior	Research	Analyst	(8374GE)
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Supervising Research Analyst (8372SM)

CLASS CHARACTERISTICS:

The Supervising Research Analyst is the supervisory level in the Research Analyst series. Positions at this level have full supervisory responsibility over a team of professional and technical staff engaged in complex, multi-disciplinary applied research, program evaluation, quality improvement, case studies, and analytical projects. Incumbents plan, assign, and evaluate the work of staff and independently develops and directs comprehensive analytical functions, evaluation programs or major program segments. This class is distinguished from the Senior Research Analyst by its formal supervisory authority, broader scope of responsibility, and coordination of an entire analytical or evaluation function rather than individual projects.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Plans, organizes and oversees applied or field research, evaluation, quality improvement, and/or case study projects, including the development of project objectives, methodologies, feasibility analyses, timelines, and milestones to ensure completion within established schedules.
2. Oversees the design and application of applied research studies, ensuring the appropriate selection statistical and evaluation methods are selected, applied, and interpreted accurately
3. Develops and maintains standardized methods and procedures and ensures consistency across projects.
4. Assigns and prioritizes the work to subordinate staff and advises subordinates regarding general objectives, methodologies and scheduling requirements for new and ongoing projects.
5. Evaluates and advises on the project scope, methods, data collection tools, project population and analytical approach to be used in projects and ensure alignment with departmental goals and initiatives.
6. Develops, selects, reviews and approves data sources, collection strategies, and procedures, including survey, questionnaires and interview tools, and ensures they align with best practices, industry standards, and departmental goals.
7. Supervises and trains staff in data collection and analyses methods, develops training materials, and ensures proper application of procedures to support evaluation, quality improvement, applied or field research, and or/case study projects.
8. Independently designs and/or oversees the design of quantitative, qualitative or mixed method strategies for evaluation, quality improvement, applied or field research, and/or case study projects.
9. Oversees the interpretation of analytical results, analyzes statistical data, and ensures the preparation of accurate reports, charts, and presentations for management and stakeholders.
10. Oversees quality assurance processes, reviews applied research, evaluation, and analytical methodologies, and ensures compliance with professional and departmental standards.
11. Validates data pulled from multiple sources by cross-referencing with official records or consulting with program staff and subject matter experts.
12. Presents evaluation and analytical findings and recommendations to management and other stakeholders, and advises management on project objectives, methodologies, timelines, and feasibility to ensure alignment with County priorities.
13. Collaborates with Data Scientists and IT staff to define or modify information system or database requirements and modifies datafiles that populate dashboards or visualization tools that support evaluation efforts and program needs.

14. Trains subordinate staff in the evaluation, quality improvement, applied or field research, and/or case study methods, including data analysis techniques, relevant to the department's needs.
15. Evaluates work of subordinates and provides technical guidance, quality control, and professional development direction to Research Analysts, program staff, and/or clerical staff.
16. Analyzes and summarizes data using software tools such as MS Excel, MS Access, SPSS, SAS, R, ArcGIS, CAD, RMS, or other departmental-specific applications (i.e., DOJ, etc.)
17. Some assignments may apply or oversee the application of geospatial analysis techniques to evaluate and interpret spatial patterns and relationships in program or community data (e.g., public health trends, crime patterns, crime maps, or service coverage), and reviews the use of Geographic Information Systems (GIS) software tools and mapping products to ensure accuracy and relevance for evaluation and analytical projects.
18. Some assignments may supervise and coordinate the analysis and dissemination of investigative or intelligence-related data to support high-profile cases, field operations, or inter-agency initiatives, and may oversee the preparation and presentation of reports to prosecutors, investigators, or command staff on patterns and trends; and/or supervise staff in the implementation of crime analysis tools and reporting systems to support field operations and strategic planning.
19. Ensures compliance with federal, state, and local laws and regulations governing law enforcement data privacy and information-sharing.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Principles and methods of applied research and evaluation, including sampling and evaluation framework for high-impact program and outcome assessment
- Principles of descriptive statistics and summarization techniques used to interpret patterns and trends in calculating reliability and validity, and the plotting and analysis for run charts and control charts
- Methods of organizing, reviewing, and presenting data and findings into reports, tables, charts and graphs, and visual dashboards
- Principles and practices of a professional or technical field as they apply to County programs, depending on area of assignment, such as, but not limited to, social welfare, public health, behavioral health, or analysis of urban systems and public facilities analysis, supervision of probationers or administration of juvenile institutions
- Methods and techniques for preparing data from administrative records, surveys, and other program data sources

General Knowledge of

- Supervisory principles and practices, including staff development, and performance evaluation
- Software tools used to analyze and visualize data (e.g., Excel, SPSS, R, SQL, and other applications)

Ability to

- Supervise, train, mentor and evaluate subordinate staff
- Plan, assign, and review the work of staff to ensure quality, accuracy and completeness in a timely manner
- Apply principles of logic and applied research methodologies to define problems, analyze variables, collect and interpret data, and draw valid conclusions and recommendations
- Organize, develop and direct efficient plans for qualitative and quantitative data collection, analysis, and reporting across varied and complex projects
- Apply appropriate statistical methods and formulas to summarize and draw valid conclusions using data that may be incomplete
- Review and ensure appropriate application of mathematical and statistical methods used by staff for collecting and summarizing varied and complex data
- Initiate, plan and complete work assignments with minimal supervision
- Read and understand specialized information and terminology, including mathematical and diagrammatic data in a particular professional or technical field, depending on area of assignment
- Read, interpret, and apply specialized information and terminology from professional technical fields relevant to area of assignment
- Orally or in writing, explain methods of data collection to persons without technical expertise
- Prepare and present oral and written findings and recommendations
- Conduct interviews and/or focus groups following a standard protocol, and employ tact when obtaining sensitive and personal information
- Establish and maintain cooperative relationships with colleagues, leadership, external partners, clients, and customers
- Develop and perform quality assurance checks to ensure accuracy, completeness, and consistency of data
- Program electronic surveys (e.g., Microsoft Forms, Survey Monkey, Qualtrics, etc.)
- Identify appropriate, validated survey measures or develop questionnaires using best practices for survey design and construction
- Ensures compliance of County data reporting policies and information security practices

Education and Experience

One (1) year of experience in the Orange County Class of a Senior Research Analyst or two (2) years of experience as a Research Analyst.

Or

A bachelor's degree from an accredited college or university in a field such as Statistics, Social Sciences, Public Administration, Public Health, Psychology, Criminal Justice, Urban Planning, Economics, or a closely related field that includes coursework in research methods, statistical analysis, program evaluation, or quantitative or qualitative research design.

And

Five (5) years of progressive professional experience in applied research, evaluation, or statistical analysis, including at least one (1) year supervising staff or leading major projects. Experience should be in fields such as public health, behavioral health, criminal justice, social services, or other related areas.

A master's degree from an accredited college or university in a field such as Statistics, Social Sciences, Public Administration, Public Health, Criminal Justice, Urban Planning, Economics, or a similar field of study that includes graduate-level coursework in research methods, statistical analysis, or research design may be substituted for one (1) year of the required experience.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***Physical and Mental Requirements***

Possess body mobility to stand, sit, walk, stoop and bend routinely to perform daily tasks and to access a standard office environment. Frequent standing and walking for extended periods. Ability to reach, push, pull and bend on an infrequent basis. Possess vision sufficient to read standard text and a computer monitor. Ability to speak and hear well enough in a moderately noisy office environment to communicate clearly and understandably in person, over the telephone or virtual meetings and in small groups. Possess manual dexterity sufficient to use hands, arms, and shoulders repetitively to write and use a computer, keyboard and mouse, and use office equipment on a frequent to constant basis.

Environmental and Working Conditions

Work is typically performed in an indoor office environment. Possess the ability to independently reason logically to analyze data, reach conclusions and make recommendations; possess the ability to remain calm and appropriately focused in rapidly changing and difficult situations involving conflict, complex issues, controversy and diverse stakeholder groups and interests; possess the ability to deal calmly and effectively with emotional interactions. May have exposure to firearms from working near law enforcement professionals.

Function effectively in a standard office environment.

**SIDE LETTER AGREEMENT TO THE 2023-2026 OPERATIONS AND SERVICE
MAINTENANCE UNIT MEMORANDUM OF UNDERSTANDING BETWEEN THE
COUNTY OF ORANGE AND TEAMSTERS, LOCAL 952**

This document shall serve as a Side Letter Agreement modifying the 2023-2026 Operations and Service Maintenance Memorandum of Understanding ("MOU") between the County of Orange ("County") and Teamsters Local 952. This Side Letter shall be effective beginning with the first full pay period after it is adopted by the County's Board of Supervisors.

Article 1. Section 4. Premium Pay

A. Night Shift Differential

1. An employee who works an assigned night shift shall, in addition to his or her regular salary, be paid a night shift differential for each hour actually worked on the assigned night shift. This provision shall also apply to employees in the Custodian classification.
2. For purposes of this Section, night shift shall mean an assigned work shift of seven (7) consecutive hours or more which includes at least four (4) hours of work between the hours of 4 p.m. and 8 a.m. Overtime which is worked as an extension of an assigned day shift shall not qualify an employee for night shift differential.
3. The rate of night shift differential shall be five (5) percent of the employee's basic hourly rate with a minimum of eighty cents (80¢) per hour and a maximum of one dollar (\$1) per hour.

B. On-Call Pay

1. When a regular, limited-term or probationary employee is assigned on-call duty by the County, the employee shall, whenever practicable, be informed in writing at least five (5) days in advance of the dates and inclusive hours of such assignment; the employee shall be compensated at one-fourth (1/4) of his or her basic hourly rate for the entire period of such assignment.
2. On-call duty requires the employee so assigned: (1) to be reachable by telephone or other communications device; (2) be able to report to work in a reasonable time; and (3) to refrain from activities which might impair his or her ability to perform assigned duties.

C. Call-Back Pay

1. When an employee returns to work because of a Department request made after the employee has completed his or her normal work shift and left the work station, the employee shall be credited with four (4) hours

work plus any hours of work in excess of four (4) hours in which the employee is continuously engaged in work for which he or she was called back.

2. Call-back shall be paid at one and one-half (1 -1/2) times the regular rate.
3. There shall not be any duplication or pyramiding of rates paid under this Section.
4. An employee shall be credited with not more than one (1) minimum four (4) hour guarantee for work performed during any four (4) consecutive hour period.
5. An employee credited with four (4) hours pursuant to this Section may be assigned other work until the guaranteed time has elapsed.
6. Call-back pay shall apply only when an employee is required to physically return to work (e.g., leave home or another off-duty location) in order to perform required duties.
7. Notwithstanding the above, if an employee receives a "call back" within four (4) hours of the beginning of the regular shift, the employee will only be paid at time and-one-half for the time period the employee begins to work until the beginning of the employee's regular shift.

D. Bilingual Pay

1. Qualified employees who meet the following criteria shall receive an additional sixty (60) cents per hour (approximately one hundred four [104] dollars per month) for all hours actually paid.
 1. An employee must be assigned by departmental management to speak or translate a language in addition to English. This includes such specialized communication skills as sign language.
 2. Employees must regularly and frequently speak and/or translate a second language, i.e., once daily.
 3. To become qualified, employees must be certified as qualified by the Chief Human Resources Officer.
2. Bilingual pay shall not apply to workers' compensation supplement pay.
3. An employee in a bilingual assignment may request assignment to a position which does not require bilingual certification. The request shall be made in writing to the department head, who will consider it according to:

- a. department need;
- b. availability of a qualified replacement; and
- c. availability of another suitable assignment for the requesting employee.

E. Firefighting

Any employee, when called back to fight fires at a landfill station, shall receive fifteen (15) dollars per call in addition to call-back pay.

F. Landfill Assignment Pay for Heavy Equipment Mechanic or Equipment Welder

An employee assigned as Relief Operator shall receive an additional one dollar (\$1.00) per hour for each hour actually worked.

G. Jail Supplemental Pay

A custodial employee who is permanently assigned to perform “pipechasing” work in the Central Jail or Intake Release Center shall, in addition to his or her biweekly salary, be paid an additional fifty (50) cents per hour (approximately eighty-seven [87] dollars per month) for all hours actually paid.

H. Confined Spaces Pay

Effective June 29, 2001, employees who go underground as part of the Confined Spaces Team shall receive one (1) dollar per hour for hours paid, as defined below. Time taken at the confined space worksite to put on safety gear and time spent at the confined space worksite in safety gear in preparation for entering a confined space shall count as time spent actually working in confined spaces.

Confined spaces as used herein, shall be defined consistent with the General Safety Orders, Article 108 of Title 8, California Administrative Code examples of confined spaces which may be eligible are: compartments, ducts, sewers, pipelines, vaults and pits.

I. High Lift Pay

Employees who work upon scaffolds or hanging platforms, at or above twenty (20) feet above grade (i.e., swing stages and bosuns’s chairs), including work upon a platform while rigging, shall receive a high lift pay differential. The differential will be paid only for those hours actually worked under these conditions at a rate of eighty-five (85) cents per hour, at a minimum of four (4) hours for any day in which qualifying work is performed. Travel time shall not be considered as qualifying for this differential.

J. Watercraft Differential Pay

Employees in positions in the class of Marine Mechanic regularly assigned to work on County watercraft, shall receive a differential of twenty-five (25) cents per hour for each hour actually paid.

K. Commercial Driver's License Pay

Employees in the classification of Fleet Technician II or Fleet Technician III who possess a valid Class A or B driver's license shall be eligible to receive an additional sixty (60) cents per hour for all hours paid, based on the following criteria:

1. The minimum requirement to receive this pay shall be the possession of a valid Class B driver's license with air brakes endorsement.
2. Department management will determine the level of license required for a particular assignment, and will also determine which assignment(s) will qualify to receive this pay.
3. Employees who are participants in the Department of Transportation (D.O.T.) Commercial License Program will qualify to receive this pay

L. Automotive Service Excellence (ASE) Certification Pay

1. Employees in the classification of Fleet Technician I, II or III who possess and maintain four to seven valid ASE Certifications shall receive an additional seventy-five cents (\$0.75 cents) per hour for all hours worked; this may not be combined with 2. below.
2. Employees in the classification of Fleet Technician I, II, or III who possess and maintain eight or more valid ASE Certifications shall receive an additional one dollar and twenty-five cents (\$1.25 cents) per hour for all hours worked; this may not be combined with 1. above.
3. There shall not be any duplicating or pyramiding of rates paid under this section. Therefore, employees who are eligible to receive one of the ASE Certification Pays listed in items 1 and 2 above, may not receive both in the same pay period.

M. Airframe and Powerplant (A&P) Certification Pay

Employees in the classification of Sheriff's Helicopter Mechanic-Inspector who possess and maintain an Airframe and Powerplant (A&P) certification issued by the Federal Aviation Administration (FAA) shall receive one dollar and seventy-five cents (\$1.75) per hour for all hours worked.

N. Crane Operator Certification Pay

Employees in the classifications listed below who possess and maintain a Certified Crane Operator (CCO) certification from the National Commission for the Certification of Crane Operators (NCCCO) and who are required to operate a crane in their regular duties shall receive two hundred dollars (\$200) per month (approximately ninety-two dollars and thirty cents [\$92.30] per pay period).

- Equipment Operator Trainee
- Equipment Operator
- Landfill Equipment Operator Trainee
- Landfill Equipment Operator
- Sr. Landfill Equipment Operator
- Power Equipment Operator I
- Power Equipment Operator II
- Sr. Power Equipment Operator
- Marine Mechanic
- Pumping Station Operator

All other terms and conditions contained in the 2023-2026 Operations and Service Maintenance Unit MOU executed between the County and Teamsters not specifically amended by this Side Letter Agreement shall remain unchanged and be unaffected by this Side Letter Agreement.

FOR TEAMSTERS, LOCAL 952:

Sam Carlin
Business Agent

Date

FOR THE COUNTY OF ORANGE:

Jamie Newton **Date**
Chief Human Resources Officer

Hetal Patel Date
Director, Employee & Labor Relations

Nicole Cove
Classification & Compensation Manager

Madai Chavez	Date
OCPW Human Resources Manager	

Board of Supervisors Approval Date

**SIDE LETTER AGREEMENT TO THE 2023-2026 SUPERVISORY MANAGEMENT
UNIT MEMORANDUM OF UNDERSTANDING BETWEEN THE COUNTY OF
ORANGE AND ORANGE COUNTY EMPLOYEES ASSOCIATION**

This document shall serve as a Side Letter Agreement modifying the 2023-2026 Supervisory Management Memorandum of Understanding ("MOU") between the County of Orange ("County") and the Orange County Employee Association ("OCEA"). This Side Letter shall be effective beginning with the first full pay period after it is adopted by the County's Board of Supervisors.

Article I. Section 4. Premium Pay

A. Night Shift Differential

1. An employee who works an assigned night shift shall, in addition to his or her regular salary, be paid a night shift differential for each hour actually worked on the assigned night shift.
2. Except as provided in subsections 5. and 6. below, for purposes of this Section, night shift shall mean an assigned work shift of seven (7) consecutive hours or more which includes at least four (4) hours of work between the hours of 4 p.m. and 8 a.m. Hours worked as an extension of an assigned shift eligible for Night Shift Differential shall be paid at the same Night Shift Differential rate as the assigned shift. Hours worked as an extension of an assigned shift not eligible for Night Shift Differential shall not be eligible for Night Shift Differential.
3. Except as provided in 4., 5. and 6., below, the rate of night shift differential shall be five (5) percent of the employee's basic hourly rate with a minimum of sixty (60) cents per hour and a maximum of one (1) dollar and fifty (50) cents per hour.
4. The rate of night shift differential for employees in the classes listed below shall be one (1) dollar and twenty-five (25) cents per hour:

Lead Public Health Nurse
Supervising Public Health Nurse

5. An employee in the below listed classes who works an assigned night shift where the majority of the hours are between 5:00 p.m. to 11:00 p.m. shall, in addition to his/her regular pay, be paid a night shift differential of one dollar and seventy five (\$1.75) cents per hour for each hour actually worked on the assigned night shift. Hours worked as an extension of an assigned shift eligible for Night Shift Differential shall be paid at the same Night Shift Differential rate as the assigned shift. Hours

worked as an extension of an assigned shift not eligible for Night Shift Differential shall not be eligible for Night Shift Differential.

Senior Comprehensive Care Nurse
Supervising Comprehensive Care Nurse

6. An employee in the below listed classes who works an assigned late night shift where the majority of the hours are between 11:00 p.m. to 7:00 a.m. shall, in addition to his or her regular pay, be paid a late night shift differential of two dollars and seventy five (\$2.75) cents per hour for each hour actually worked on the assigned late night shift. Hours worked as an extension of an assigned shift eligible for Night Shift Differential shall be paid at the same Night Shift Differential rate as the assigned shift. Hours worked as an extension of an assigned shift not eligible for Night Shift Differential shall not be eligible for Night Shift Differential.

Senior Comprehensive Care Nurse
Supervising Comprehensive Care Nurse

7. Effective June 28, 2024, employees in the classes of Custodian Leadworker and Supervising Custodian I and II shall be eligible to receive night shift differential premium pay.

B. On-Call Pay

1. When a regular, limited-term or probationary employee is assigned on-call duty by the County, the employee shall, whenever practicable, be informed in writing at least five (5) days in advance of the dates and inclusive hours of such assignment; the employee shall be compensated at one-fourth (1/4) of his or her basic hourly rate for the entire period of such assignment.
2. On-call duty requires the employee so assigned to: (1) be reachable by telephone or other communications device; (2) be able to report to work in a reasonable time; and (3) to refrain from activities which might impair his or her ability to perform assigned duties.

C. Call-Back Pay

1. When an employee returns to work because of a department request made after the employee has completed his or her normal work shift and left the work station, the employee shall be credited with four (4) hours work plus any hours of work in excess of four (4) hours in which the employee is continuously engaged in work for which he or she was called back.

2. Call-back shall be paid at one and one-half (1 1/2) times the regular rate.
3. There shall not be any duplication or pyramiding of rates paid under this Section.
4. An employee shall be credited with not more than one (1) minimum four (4) hour guarantee for work performed during any four (4) consecutive hour period.
5. An employee credited with four (4) hours pursuant to this Section may be assigned other work until the guaranteed time has elapsed.
6. Call-back pay shall apply only when an employee is required to physically return to work (e.g., leave home or another off-duty location) in order to perform required duties.

D. Bilingual Pay

1. Except as provided in 2. below, qualified employees who meet the following criteria shall receive an additional forty (40) cents per hour (approximately sixty-nine [69] dollars per month) for all hours actually paid.
 - a. An employee must be assigned by departmental management to speak or translate a language in addition to English. This includes such specialized communication skills as sign language.
 - b. Employees must regularly and frequently speak and/or translate a second language, i.e., once daily.
 - c. To become qualified, employees must be certified as qualified by the Chief Human Resources Officer.

2. Exceptional Bilingual Pay

Qualified employees in the following classes who, in addition to meeting the criteria in 1.a., b. and c. above, are assigned by department management to perform exceptional bilingual duties that are essential to the performance of their professional and/or technical duties and

responsibilities shall receive an additional seventy (70) cents per hour (approximately one hundred and twenty-one (121) dollars per month) for all hours actually paid:

Eligibility Supervisor
Program Assistant

Senior Comprehensive Care Nurse
Senior Defense Investigator
Supervising Child Support
Specialist Lead Public Health
Nurse Supervising Public Health
Nurse

3. An employee shall not be eligible to receive more than one (1) type of bilingual pay concurrently.
4. Bilingual pay shall not apply to workers' compensation supplement pay.
5. An employee in a bilingual assignment may request assignment to a position which does not require bilingual certification. The request shall be made in writing to the department head, who will consider it according to:
 - a. department need;
 - b. availability of a qualified replacement; and
 - c. availability of another suitable assignment for the requesting employee.
6. Upon the agreement of the County and OCEA, negotiations shall be reopened for the sole purpose of considering the addition or deletion of classes eligible for exceptional bilingual pay.

E. Jail Salary Supplement

1. An office services supervisor who is permanently assigned to the Central Jail/Intake Release Center (including Correctional Medical Services), the James A. Musick Facility, the Theo Lacy Facility, or Inmate Records, in addition to his or her biweekly salary, be paid an additional seventeen (17) cents per hour (approximately thirty [30] dollars per month) for all paid hours until the new rate provided below is effective.

Effective as soon as practicable following adoption by the Board of Supervisors on or after June 30, 2023, and to be implemented following completion of an audit within 90 days to confirm only qualifying positions within eligible classifications and assigned to work in a correctional setting are receiving the premium pay, eligible employees will be paid an additional seventy-five cents (\$0.75) per hour (approximately one hundred thirty dollars [\$130] per month) for all hours paid.

2. An HCA Service Chief I or II who is permanently assigned to the Central Jail/Intake Release Center (including Correctional Medical Services), , the

James A. Musick Facility, the Theo Lacy Facility, shall, in addition to his or her biweekly salary, be paid an additional seventy-five (75) cents per hour (approximately one-hundred and thirty [130] dollars per month) for all paid hours until the new rate provided below is effective.

Effective as soon as practicable following adoption by the Board of Supervisors on or after June 30, 2023, and to be implemented following completion of an audit within 90 days to confirm only qualifying positions within eligible classifications and assigned to work in a correctional setting are receiving the premium pay, eligible employees will be paid an additional one dollar and fifty-cents (\$1.50) per hour (approximately two hundred sixty dollars [\$260] per month) for all hours paid.

3. An employee in the classification of Building Maintenance Supervisor who is permanently assigned to the Central Jail/Intake Release Center, the Theo Lacy Facility, or the James Musick Facility shall receive, in addition to biweekly salary, an additional seventy-five (75) cents per hour for all hours paid until the new rate provided below is effective.

Effective as soon as practicable following adoption by the Board of Supervisors on or after June 30, 2023, and to be implemented following completion of an audit within 90 days to confirm only qualifying positions within eligible classifications and assigned to work in a correctional setting are receiving the premium pay, eligible employees will be paid an additional one dollar and fifty-cents (\$1.50) per hour (approximately two hundred sixty dollars [\$260] per month) for all hours paid.

4. This salary supplement shall not apply to workers' compensation supplement pay or be used as a base rate for overtime, other premium pay, etc., unless otherwise required by law.
5. There shall not be any duplication or pyramiding of rates paid under this Section related to assignment to a correctional or institutional facility.

F. Firefighting Call-Back Pay

Employees in this Representation Unit who are called back to fight fires at a landfill station or in support of wildland fires shall receive seven (7) dollars per call in addition to call-back pay.

G. Comprehensive Care Nurse Jail Incentive

An employee in any of the below listed classes assigned to work in an adult or juvenile correctional or institutional facility shall, in addition to his or her regular pay, be paid seventy five (75) cents per hour for all hours paid until the rate provided below is effective.

Effective as soon as practicable following adoption by the Board of Supervisors on or after June 30, 2023, and to be implemented following completion of an audit within 90 days to confirm only qualifying positions within eligible classifications and assigned to work in a correctional setting are receiving the premium pay, eligible employees will be paid an additional one dollar and fifty-cents (\$1.50) per hour (approximately two hundred sixty dollars [\$260] per month) for all hours paid.

Senior Comprehensive Care Nurse
Supervising Comprehensive Care Nurse

1. This incentive shall not apply to worker's compensation supplement pay or be used as a base rate for overtime, other premium pay, etc.
2. There shall not be any duplication or pyramiding of rates paid under this Section related to assignment to a correctional or institutional facility.

H. Confined Spaces Pay

1. Senior Maintenance Inspectors who are regularly assigned to the Public Works Operations Confined Space Inspection Team shall receive one dollar twenty-five cents (1.25) per hour for those hours actually spent working in confined spaces, as defined in 2., below. Time taken at the confined space worksite to put on safety gear and time spent at the confined space worksite in safety gear in preparation for entering a confined space shall count as time spent actually working in confined spaces.
2. Confined spaces, as used herein, shall be defined consistent with the General Safety Orders, Article 108 of Title 8, California Administrative Code. Examples of confined spaces which may be eligible include compartments, ducts, sewers, pipelines, vaults and pits.

I. Emergency Communications Training and Certification Pay

1. Employees in the classification of Sheriffs Special Officer III who are assigned to receive training as or act in the capacity of a Radio Dispatcher or Communication Coordinator shall receive an additional two dollars and three (2.03) cents per hour for all hours assigned while training or acting in the capacity of a Radio Dispatcher or Communication Coordinator at the Emergency Communications Bureau.
2. If, during the term of the contract, the difference between the step 12 hourly rate of the Radio Dispatcher classification and the step 12 hourly rate of the Sheriffs Special Officer II classification exceeds two dollars and

three (2.03) cents per hour, the premium will be adjusted accordingly.

J. Commercial Driver's License Pay

Employees in the classifications of, Supervising Fleet Technician and Senior Agricultural Standards Inspector who possesses a valid Class A or Class B driver's license shall be eligible to receive an additional sixty (60) cents per hour for all hours actually paid, based on the following criteria:

1. The minimum requirement to receive this pay shall be the possession of a valid Class B driver's license with air brakes endorsement.
2. Department management will determine the level of license required for a particular assignment, and will also determine which assignment(s) will qualify to receive this pay.
3. Employees who are participants in the Department of Transportation (D.O.T.) Commercial License Program will qualify to receive this pay.

K. Nurse Retention Incentive

1. Upon completion of approximately 10,400 service hours (approximately five years of service), regular or limited-term full-time employees in a Nurse classification shall receive three (3) percent of annual base salary as a one-time, lump sum payment. Regular or limited-term part-time employees shall receive the retention incentive upon completion of approximately 5,200 service hours (approximately five equivalent years of service).
2. Upon completion of approximately 20,800 service hours (approximately ten years of service), regular or limited-term full-time employees in a Nurse classification shall receive three (3) percent of annual base salary as a one-time, lump sum payment. Regular or limited-term part-time employees shall receive the retention incentive upon completion of approximately 10,400 service hours (approximately ten equivalent years of service).
3. The Nurse Retention Incentive shall be processed within two (2) pay periods of the completion of the required service hours.

L. Nurse Hiring Incentive

Each employee in a Nurse classification who completes new employee probation shall receive a one-time, lump sum incentive of one thousand (\$1,000) dollars, within two (2) pay periods after completion of new employee probation.

M. Advanced Certification Pay

The following employees shall receive, in addition to their bi-weekly salary, the equivalent of one hundred nineteen (119) dollars a month or approximately fifty-five (55) dollars bi-weekly for receiving an Advanced Appraisal Certificate issued by the State Board of Equalization.

Managing Appraiser
 Managing Auditor-Appraiser
 Senior Appraiser
 Senior Auditor-Appraiser

N. Training Officer Assignment Pay

Employees in the classification of Sheriffs Special Officer III assigned to John Wayne Airport, Security Bureau, Court Operations, all jail facilities or the Training Academy on a regular, full-time basis who are responsible for training new Sheriffs Special Officers shall be paid one dollar (\$1.00) per hour for all hours assigned to perform such training functions.

Additionally, employees in the classification of Senior Correctional Services Technician shall be paid one dollar (\$1.00) per hour for all hours assigned to perform training for other Correctional Service Technicians.

O. Toxic Hazard Duty Pay

1. Employees on pay status in the classification of Senior Forensic Scientist who are assigned to the Clandestine Lab Section of Forensic Services shall receive one hundred seventy-five (\$175) dollars per month (approximately \$80.77 per pay period).
2. An employee in the class of Supervising Hazardous Materials Specialist assigned to the Emergency Response Team for the purpose of responding to a toxic hazard emergency shall be paid \$1.00 (one-dollar) per hour for all hours worked while assigned to the Hazardous Materials Emergency Response Team.

P. Automotive Service Excellence (ASE) Certification Pay

1. Employees in the classification of Supervising Fleet Technician who possess and maintain four to seven valid ASE Certifications shall receive an additional seventy-five cents (\$.75) per hour for all hours worked; this may not be combined with 2. below.
2. Employees in the classification of Supervising Fleet Technician who possess and maintain eight or more valid ASE Certifications shall receive an additional one dollar and twenty-five cents (\$1.25) per hour for all hours worked; this may not be combined with 1. above.

3. There shall not be any duplicating or pyramiding of rates paid under this Section. Therefore, employees who are eligible to receive one of the ASE Certification Pays listed in items 1 and 2 above may not receive both in the same pay period.

Q. Professional Land Surveyor License Pay

Employees in the classification of Surveyor III who possess and maintain a Professional Land Surveyor License issued by the State of California shall qualify to receive an additional one dollar and fifty cents (\$1.50) per hour for all hours worked, if any of the following criteria are met:

1. Department management will determine which assignment(s) will qualify to receive this pay.
2. Employees must be assigned to a position that utilizes the Professional Land Surveyor License.

R. Engineering Certification Pay

Employees in the classification of Senior Project Manager who possess and maintain a Professional Engineer (Civil) license issued by the California State Board of Professional Engineers shall receive an additional 5.5% pay for all hours worked, based on the following criteria:

1. Department management will determine which assignment(s) and employee(s) will qualify to receive this pay.
2. Supervise and/or manage professional, technical, and/or construction personnel/consultants performing engineering work on Capital and Maintenance Improvement projects.

S. Case Call Pay

When a Supervising Deputy Public Guardian receives a case call at home, the employee shall be paid at time and one-half (1 ½) the regular rate with one (1) hour minimum for each case.

T. Board Certification Pay

1. For the purposes of this section, Board Certification shall mean those Board Certifications designated by a State of California or National Board.
2. Employees in pay status and assigned on a regular, full-time basis in the classifications of Supervising Therapist, California Children Services and Therapy Consultant, California Children Services, who are Board Certified in a Pediatric Specialty, shall receive, in addition to their salary, the

equivalent of three hundred fourteen dollars (\$314) monthly (approximately one hundred forty-five dollars (\$145) bi-weekly).

3. Employees in part-time regular or part-time limited-term positions shall receive pro-rata Board certification pay in bi-weekly segments.

U. Major Accident Reconstruction Team (M.A.R.T.) Pay

Employees in the classification of Senior Sheriff's Community Services Officer on pay status and assigned to the Major Accident Reconstruction Team (M.A.R.T.) on a regular, full-time basis shall receive the equivalent of fifty three dollars and eight cents (\$53.08) biweekly (approximately one hundred and fifteen dollar (\$115) per month).

In the event an employee assigned to M.A.R.T. is on pay status for a portion of the pay period, M.A.R.T. shall be based on the ratio of hours actually paid to hours in a pay period (eighty (80) hours).

V. Special Assignment Pay

Any full-time regular, limited term or probationary employee in the following classifications permanently assigned to the Crisis Stabilization Unit (CSU) or to the Crisis Assessment Team (CAT), which includes the Psychiatric Emergency Response Team (PERT), shall be paid an additional one dollar and fifty cents (\$1.50) per hour for all hours worked:

Service Chief I & II

There shall not be any duplication or pyramiding of rates paid under this Section, including Jail Salary Supplement provided in Section E., above.

W. Clinical or Mental Health Supervision Pay

Employees in the classifications of Senior Social Services Supervisor or HCA Service Chief I & II, whose license is used to authorize the performance of duties and who are designated by the department to provide supervised clinical hours for those classification that are obtaining clinical hours, shall be paid an additional two dollars (\$2.00) per hour for all hours such licensure is required.

X. Emergency Response Assignment Pay

1. Full-time, limited term or probationary employees in the Senior Social Services Supervisor classification assigned to Emergency Response or Foster Care Investigations shall be paid, in addition to their regular salary, the equivalent of one dollar and fifty cents (\$1.50) per hour for all hours worked.

2. Employees must be in an active status to be eligible for Emergency Response Assignment pay. Employees in a transitional work assignment are not eligible for Emergency Response Assignment pay.
3. In the event an eligible employee is not in active status for a portion of a pay period, Emergency Response Assignment Pay shall be based on a ratio of hours actually worked to hours in a pay period (eighty [80] hours).

Y. Airframe and Powerplant (A&P) Certification Premium Pay

Employees in the classification of Sheriff's Supervising Helicopter Mechanic-Inspector who possess and maintain an Airframe and Powerplant (A&P) license issued by the Federal Aviation Administration (FAA) shall receive an additional one dollar and seventy-five cents (\$1.75) per hour for all hours worked.

All other terms and conditions contained in the 2023-2026 Supervisory Management Unit MOU executed between the County and OCEA not specifically amended by this Side Letter Agreement shall remain unchanged and be unaffected by this Side Letter Agreement.

**FOR ORANGE COUNTY
EMPLOYEES ASSOCIATION:**

FOR THE COUNTY OF ORANGE:

Charles Barfield General Manager	Date
-------------------------------------	------

Jamie Newton
Chief Human Resources Officer

Date _____

Veronica Rodarte
Operations Manager

Hetal Patel Date
Director, Employee & Labor Relations

Nicole Cove
Classification & Compensation Manager

Madai Chavez
OCPW Human Resources Manager

Board of Supervisors Approval Date

**SIDE LETTER AGREEMENT TO THE 2023-2026 ADMINISTRATIVE MANAGEMENT
UNIT MEMORANDUM OF UNDERSTANDING BETWEEN THE COUNTY OF
ORANGE AND THE COUNTY MANAGERS ASSOCIATION**

This document shall serve as a Side Letter Agreement modifying the 2023-2026 Administrative Management Unit Memorandum of Understanding (“MOU”) between the County of Orange (“County”) and the County of Managers Association (“OCMA”). This Side Letter shall be effective beginning with the first full pay period after it is adopted by the County’s Board of Supervisors.

The County of Orange (County) and Orange County Managers Association (OCMA) agree as follows:

Employees holding the title of Medical Services Manager (Title Code 8259MA) and Medical Services Manager, Senior (Title Code 8260MA) within units #1430 Public Health Laboratory, #3320 Juvenile Health Services, and #3360 Correctional Medical Services as of the effective date of implementation of the Health Services Management occupational series will maintain their current title until they vacate their current position, at which time the position will be reallocated to the appropriate class within the Health Services management classification. The Medical Services Manager and Medical Services Manager, Senior classifications will be deleted once the last position is vacated.

The parties agree that this side letter agreement shall not serve as a precedent, binding or otherwise, to any other Medial Services Management classifications represented by OCMA, excepting the matter resolved by this agreement. All other terms and conditions contained in the 2023-2026 County of Managers Association Unit MOU executed between the County and OCMA not specifically amended by this Side Letter Agreement shall remain unchanged and be unaffected by this Side Letter Agreement.

FOR OCMA:

Stacey McCoy
OCMA Executive Director

Date

FOR THE COUNTY OF ORANGE:

 Jamie Newton Date
 Chief Human Resources Officer

Artin Baron
OCMA President

Date

Hetal Patel	Date
Director, Employee & Labor Relations	



Continuation or Deletion Request

Date: 9/19/25
To: Clerk of the Board of Supervisors
From: Michelle Aguirre, County Executive Officer
Re: ASR Control #: 25-000609, Meeting Date 9/23/25 Agenda Item No. # 33
Subject: Homelessness: Is Orange County Moving in the Right Direction? Grand Jury Report

Digitally signed by
Michelle Aguirre
Date: 2025.09.19
09:23:36 -07'00'

MAguirre

☒ Request to continue Agenda Item No. # 33 to the 10/14/25 Board Meeting.

Comments:

☐ Request deletion of Agenda Item No. # _____

Comments:

2025 SEP 19 AM 9:41
CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

RECEIVED



RECEIVED

2025 SEP 17 AM 11:28

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

MEMORANDUM

To: Clerk of the Board

From: Supervisor Donald P. Wagner, Third District

Date: September 16, 2025

RE: **Item for September 23, 2025 Board of Supervisors Meeting**

534A

Please add this as a supplemental calendar item to the September 23, 2025, Board of Supervisors meeting:

Resolution Opposing Proposition 50 on the November 2025 Ballot

Purpose of Resolution:

In 2008 and 2010, California voters approved two ballot measures that stopped partisan gerrymandering by delegating the drawing of both state legislative and congressional district lines to a nonpartisan Citizens Redistricting Commission. Since its creation, the Commission has made district lines fairer and more balanced, while also attempting to keep communities together.

Proposition 50 would reverse those two votes of the people and undermine 15 years of progress in ensuring that our congressional districts are drawn fairly and not by politicians with an eye to their own political future. This Resolution opposes the gerrymandering of Proposition 50.

**A RESOLUTION OF THE COUNTY OF ORANGE ADOPTING A POSITION OF OPPOSITION TO
PROPOSITION 50 ON THE NOVEMBER 2025 BALLOT**

WHEREAS, Proposition 50, appearing on the November 2025 California ballot, proposes to amend the California Constitution to alter the process for drawing congressional districts; and

WHEREAS, the current process, established by voters, assigns the responsibility for drawing congressional districts to the independent California Citizens Redistricting Commission, designed to operate in a non-partisan manner; and

WHEREAS, Proposition 50 would transfer the authority to draw congressional districts from the California Citizens Redistricting Commission to the State Legislature; and

WHEREAS, the independent California Citizens Redistricting Commission was created to ensure fair and impartial district boundaries, including safeguards to keep cities, counties, and local communities together; and

WHEREAS, Proposition 50 would remove existing safeguards intended to maintain the integrity of local communities in the redistricting process; and

WHEREAS, Proposition 50 proposes dividing communities, forcing some cities and counties to be split among multiple congressional districts under the measure's new maps and diminishing their voice in Congress; and

WHEREAS, the Orange County Board of Supervisors recognizes the importance of maintaining a transparent and independent redistricting process to uphold public trust in electoral systems; and

WHEREAS, the Orange County Board of Supervisors believes that Proposition 50 undermines the voter-approved framework for fair redistricting in California;

NOW, THEREFORE, BE IT RESOLVED that the County of Orange hereby adopts an official position of opposition to Proposition 50 on the November 2025 ballot.



County Executive Office

Memorandum

September 17, 2025

To: Clerk of the Board of Supervisors
From: Michelle Aguirre, County Executive Officer *MAguirre*
Subject: Supplemental Request According to Board Rule 21

Digitally signed by
Michelle Aguirre
Date: 2025.09.18
13:48:36 -07'00'

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

2025 SEP 18 PM 2:39

RECEIVED

S34B

The County Executive Office is requesting a Supplemental Agenda Staff Report for the September 23, 2025, Board Hearing.

Agency: Internal Audit Department
Subject: Approve Sole Source Contract for Independent Risk Assessment
Districts: All Districts

Reason Item is Supplemental: In order to satisfy procurement requirements associated with this contract, this Agenda Staff Report and attachments were finalized after the filing deadline of the Clerk of the Board.

Justification: This item cannot be moved to another date due to the predetermined deadline directed by the Board of Supervisors. Timely receipt of the independent risk assessment results is critical for the Internal Audit Department to update its Fiscal Year 2025-26 Audit Plan and initiate audits addressing newly identified high-risk areas. Therefore, the contract must be presented as timely as possible to the Board.

Concur:

Doug Chaffee

Doug Chaffee, Chair of the Board of Supervisors

cc: Board of Supervisors
County Executive Office
County Counsel



SUPPLEMENTAL AGENDA ITEM AGENDA STAFF REPORT

Agenda Item
Clerk's Use Only

534B

RECEIVED
2025 SEP 18 PM 2:39
CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

MEETING DATE: 09/23/25
LEGAL ENTITY TAKING ACTION: Board of Supervisors
BOARD OF SUPERVISORS DISTRICT(S): All Districts
SUBMITTING AGENCY/DEPARTMENT: Internal Audit Department
DEPARTMENT HEAD REVIEW:

Digitally signed by Agripino
Alonso
Date: 2025.09.16 14:27:17 -07'00'

Department Head Signature

DEPARTMENT CONTACT PERSON(S): Aggie Alonso (714) 834-5442
Jose A. Olivo (714) 834-5509

SUBJECT: Approve Sole Source Contract for Independent Risk Assessment

CEO CONCUR

Digitally signed by
Michelle Aguirre
Date: 2025.09.18
13:49:31 -07'00'

CEO Signature

COUNTY COUNSEL REVIEW

APPROVED AGREEMENT TO FORM

DocuSigned by:

Action

C44B72F8A8EE41C
County Counsel Signature

CLERK OF THE BOARD
Discussion

3 Votes Board Majority

Budgeted: Yes

Current Year Cost: \$129,500

Annual Cost: N/A

Staffing Impact: No

of Positions: N/A

Sole Source: Yes

Current Fiscal Year Revenue: N/A

Funding Source: GF: 100%

County Audit in last 3 years: No

Levine Act Review Completed: N/A

Prior Board Action: N/A

RECOMMENDED ACTION(S):

Authorize the County Procurement Officer or Deputized designee to execute a sole source contract with Macias Gini & O'Connell LLP to conduct an independent risk assessment for use in modifying the Fiscal Year 2025-26 Audit Plan to incorporate audits of high-risk areas identified and for use in developing the Fiscal Year 2026-27 Audit Plan, effective upon execution of all necessary signatures through April 30, 2026, in an amount not to exceed \$129,500.

SUMMARY:

Approval of the sole source contract with Macias Gini & O'Connell LLP will allow the Internal Audit Department to incorporate audits of high-risk areas identified by the Contractor's risk assessment to update their FY 2025-26 Audit Plan and develop their FY 2026-27 Audit Plan, as recommended by the Audit Oversight Committee and directed by the Board of Supervisors at its June 24, 2025 meeting.

BACKGROUND INFORMATION:

The Internal Audit Department (IAD) supports and assists the Board of Supervisors (Board) and County management in the realization of their business goals and objectives by testing and reporting on the effectiveness of County internal control systems and efficiency of business processes. To accomplish this, IAD prepares an Annual Risk Assessment and Audit Plan (Audit Plan), which is a comprehensive plan that details audits to be completed in the upcoming fiscal year. The FY 2025-26 Audit Plan consisted of 63% of carryover audits from the previous year that IAD did not conduct as planned due to Board directives that far exceeded budgeted reserves for unplanned/special assignments and unfilled vacancies. These carryover audits limited IAD's capacity to add new audits to the FY 2025-26 Audit Plan and as a result, IAD performed a modified Countywide risk assessment.

At the Audit Oversight Committee's (AOC) meeting on May 15, 2025, the AOC approved IAD's FY 2025-26 Audit Plan, and recommended for IAD to contract with a reputable Certified Public Accounting (CPA) firm that was already approved by County procurement, to conduct an independent risk assessment by October 31, 2025. The independent risk assessment would be used to modify the FY 2025-26 Audit Plan to incorporate audits of high-risk areas and develop the FY 2026-27 Audit Plan. On June 24, 2025, the Board approved IAD's FY 2025-26 Audit Plan and AOC's recommendation (Attachment C).

IAD selected Macias Gini & O'Connell LLP (MGO) from the County Procurement Office's (CPO's) approved slate of audit services contractors. However, the CPO later advised that we could not use their slate of contractors because it had expired. Due to the Board's directive and deadline for the risk assessment, IAD obtained a quote from MGO. The proposed contract is a sole source contract. MGO is a reputable CPA firm that has familiarity with County operations and risk assessment expertise, and has provided services to the County in the areas of financial audits, IT risk assessment consulting, and performance audits. These factors are critical for the timely and appropriate assessment of the County's high-risk areas.

IAD now requests Board approval of the sole source contract with MGO (Attachment A), effective through April 30, 2026, for the amount of \$129,500, as noted in the Recommended Action. This contract requires Board approval as it exceeds the annual \$75,000 approval threshold for sole source contracts.

The Orange County Preference Policy is not applicable to this Contract award, and the Contract does not include subcontractors or pass through to other providers. See Attachment B for the Contract Summary.

The IAD has verified there are no concerns that must be addressed with respect to MGO's ownership/name, litigation status or conflicts with County interests. The IAD has also collaborated with CPO to conduct a due diligence check as required by the revised 2024 Contract Policy Manual.

FINANCIAL IMPACT:

Appropriations for this Contract are included in Internal Audit Department, Budget Control 079, Fiscal Year 2025-26 Budget.

STAFFING IMPACT:

N/A

ATTACHMENT(S):

Attachment A – Contract CT-017-26010208

Attachment B – Contract Summary Form

Attachment C – Board Directive from June 24, 2025

Contract CT-017-26010208
For
Independent Risk Assessment
Between
County Executive Office – Internal Audit Department
And
Macias Gini & O’Connell LLP



CONTRACT

**CT-017-26010208
BETWEEN
COUNTY OF ORANGE
AND
Macias Gini & O'Connell LLP
FOR
Independent Risk Assessment**

This Contract CT-017-26010208 for Independent Risk Assessment (Contract) is made and entered into as of the date fully executed by and between the County of Orange, a political subdivision of the State of California ("County"), and Macias Gini & O'Connell LLP, a State Of California Partnership (Contractor), with County and Contractor sometimes referred to as Party or collectively as Parties.

ATTACHMENTS

This Contract is comprised of this document and the following Attachments, which are attached hereto and incorporated by reference into this Contract:

Attachment A – Scope of Work

Attachment B – Payment and Compensation

RECITALS

WHEREAS, Contractor and County are entering into this Contract for Independent Risk Assessment under a firm fixed fee Contract; and,

WHEREAS, County solicited Contract for Independent Risk Assessment as set forth herein, and Contractor represented that it is qualified to provide Independent Risk Assessment to the County as further set forth here; and,

WHEREAS, Contractor agrees to provide Independent Risk Assessment to the County as further set forth in the Scope of Work, attached hereto as Attachment A; and,

WHEREAS, County agrees to pay Contractor based on the schedule of fees set forth in Payment/Compensation, attached hereto as Attachment B; and,

WHEREAS, the County Board of Supervisors has authorized the Procurement Officer or designee to enter into a Contract for Independent Risk Assessment with the Contractor; and,

NOW, THEREFORE, the Parties mutually agree as follows:

ARTICLES

GENERAL TERMS AND CONDITIONS

1. Governing Law and Venue:

This Contract has been negotiated and executed in the state of California and shall be governed by and construed under the laws of the state of California. In the event of any legal action to enforce or interpret this Contract, the sole and exclusive venue shall be a court of competent jurisdiction located in Orange County, California, and the parties hereto agree to and do hereby submit to the jurisdiction of such court, notwithstanding Code of Civil Procedure Section 394. Furthermore, the parties specifically agree to waive any and all rights to request that an action be transferred for adjudication to another county.

2. Entire Contract:

This Contract contains the entire Contract between the parties with respect to the matters herein, and there are no restrictions, promises, warranties or undertakings other than those set forth herein or referred to herein. No exceptions, alternatives, substitutes or revisions are valid or binding on County unless authorized by County in writing. Electronic acceptance of any additional terms, conditions or supplemental Contracts by any County employee or agent, including but not limited to installers of software, shall not be valid or binding on County unless accepted in writing by County's Procurement Agent or designee.

3. Amendments:

No alteration or variation of the terms of this Contract shall be valid unless made in writing and signed by the parties; no oral understanding or agreement not incorporated herein shall be binding on either of the parties; and no exceptions, alternatives, substitutes or revisions are valid or binding on County unless authorized by County in writing.

4. Taxes:

Unless otherwise provided herein or by law, price quoted does not include California state sales or use tax. Out-of-state Contractors shall indicate California Board of Equalization permit number and sales permit number on invoices, if California sales tax is added and collectable. If no permit numbers are shown, sales tax will be deducted from payment. The Auditor-Controller will then pay use tax directly to the State of California in lieu of payment of sales tax to Contractor.

5. Delivery:

Time of delivery of commodities and services is of the essence in this Contract. County reserves the right to refuse any commodities and services and to cancel all or any part of the commodities not conforming to applicable specifications, drawings, samples or descriptions or services that do not conform to the prescribed scope of work. Acceptance of any part of the order for commodities shall not bind County to accept future shipments nor deprive it of the right to return commodities already accepted at Contractor's expense. Over shipments and under shipments of commodities shall be only as agreed to in writing by County. Delivery shall not be deemed to be complete until all commodities or services have actually been received and accepted in writing by County.

6. Acceptance Payment:

Unless otherwise agreed to in writing by County, 1) acceptance shall not be deemed complete unless in writing and until all the commodities/services have actually been received, inspected, and tested to the satisfaction of County, and 2) payment shall be made in arrears after satisfactory acceptance.

7. Warranty:

Contractor expressly warrants that the commodities covered by this Contract are 1) free of liens or encumbrances, 2) merchantable and good for the ordinary purposes for which they are used, and 3) fit for the particular purpose for which they are intended. Acceptance of this order shall constitute an agreement upon Contractor's part to indemnify, defend and hold County and its indemnitees as identified in the Insurance and Indemnification section, and as more fully described in the Insurance and Indemnification section harmless from liability, loss, damage and expense, including reasonable counsel fees, incurred or sustained by County by reason of the failure of the goods/services to conform to such warranties, faulty work performance, negligent or unlawful acts, and non-compliance with any applicable state or federal codes, ordinances, orders, or statutes, including the Occupational Safety and Health Act (OSHA) and the California Industrial Safety Act. Such remedies shall be in addition to any other remedies provided by law.

8. Patent/Copyright Materials/Proprietary Infringement:

Unless otherwise expressly provided in this Contract, Contractor shall be solely responsible for clearing the right to use any patented or copyrighted materials in the performance of this Contract. Contractor warrants that any software as modified through services provided hereunder will not infringe upon or violate any patent, proprietary right, or trade secret right of any third party. Contractor agrees that, in accordance with the more specific requirement contained in the Insurance and Indemnification section, it shall indemnify, defend and hold County and County Indemnitees harmless from any and all such claims and be responsible for payment of all costs, damages, penalties and expenses related to or arising from such claim(s), including, costs and expenses but not including attorney's fees.

9. Assignment:

The terms, covenants, and conditions contained herein shall apply to and bind the heirs, successors, executors, administrators and assigns of the parties. Furthermore, neither the performance of this Contract nor any portion thereof may be assigned by Contractor without the express written consent of County. Any attempt by Contractor to assign the performance or any portion thereof of this Contract without the express written consent of County shall be invalid and shall constitute a breach of this Contract.

10. Non-Discrimination:

In the performance of this Contract, Contractor agrees that it will comply with the requirements of Section 1735 of the California Labor Code and not engage nor permit any subcontractors to engage in discrimination in employment of persons because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, or sex of such persons. Contractor acknowledges that a violation of this provision shall subject Contractor to penalties pursuant to Section 1741 of the California Labor Code.

11. Termination:

In addition to any other remedies or rights it may have by law, County has the right to immediately terminate this Contract without penalty for cause or after 30 days' written notice without cause, unless otherwise specified. Cause shall be defined as any material breach of contract, any misrepresentation or fraud on the part of Contractor. Exercise by County of its right to terminate Contract shall relieve County of all further obligation.

12. Consent to Breach Not Waiver:

No term or provision of this Contract shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute consent to, waiver of, or excuse for any other different or subsequent breach.

13. Independent Contractor:

Contractor shall be considered an independent contractor and neither Contractor, its employees, nor anyone working under Contractor shall be considered an agent or an employee of County. Neither Contractor, its employees nor anyone working under Contractor shall qualify for workers' compensation or other fringe benefits of any kind through County.

14. Performance Warranty:

Contractor shall warrant all work under this Contract, taking necessary steps and precautions to perform the work to County's satisfaction. Contractor shall be responsible for the professional quality, technical assurance, timely completion and coordination of all documentation and other commodities/services furnished by Contractor under this Contract. Contractor shall perform all work diligently, carefully, and in a good and workmanlike manner; shall furnish all necessary labor, supervision, machinery, equipment, materials, and supplies, shall at its sole expense obtain and maintain all permits and licenses required by public authorities, including those of County required in its governmental capacity, in connection with performance of the work. If permitted to subcontract, Contractor shall be fully responsible for all work performed by subcontractors.

15. Changes:

Contractor shall make no changes in the work or perform any additional work without County's specific written approval.

16. Change of Ownership/Name, Litigation Status, Conflicts with County Interests:

Contractor agrees that if there is a change or transfer in ownership of Contractor's business prior to completion of this Contract, and the County agrees to an assignment of the Contract, the new owners shall be required under terms of sale or other transfer to assume Contractor's duties and obligations contained in this Contract and complete them to the satisfaction of the County.

Notwithstanding other notice or termination provisions contained herein, County reserves the right to immediately terminate this Contract, as of the date on which the County provides written determination of termination of this Contract under this provision anytime upon or after assignment, in the event that the

County determines that the assignee is not qualified or is otherwise unacceptable to the County for the provision of services or commodities under this Contract. In the event of an immediate termination under this provision, the Contractor shall promptly refund the County an amount equal to the pro rata portion of any charges the County paid in advance for any remaining portion of the Contract after the date of termination. Likewise, the County shall not be liable for payment for any remaining services not yet provided and accepted by the County under this Contract after the date of termination for any payments to be made in arrears pursuant to the terms of the Contract.

17. Force Majeure:

Contractor shall not be assessed with liquidated damages or unsatisfactory performance penalties during any delay beyond the time named for the performance of this Contract caused by any act of God, war, civil disorder, employment strike or other cause beyond its reasonable control, provided Contractor gives written notice of the cause of the delay to County within 36 hours of the start of the delay and Contractor avails himself of any available remedies.

18. Confidentiality:

Contractor agrees to maintain the confidentiality of all County and County-related records and information pursuant to all statutory laws relating to privacy and confidentiality that currently exist or exist at any time during the term of this Contract. All such records and information shall be considered confidential and kept confidential by Contractor and Contractor's staff, agents and employees.

19. Compliance with Laws:

Contractor represents and warrants that services to be provided under this Contract shall fully comply, at Contractor's expense, with all standards, laws, statutes, restrictions, ordinances, requirements, and regulations (collectively "laws"), including, but not limited to those issued by County in its governmental capacity and all other laws applicable to the services at the time services are provided to and accepted by County. Contractor acknowledges that County is relying on Contractor to ensure such compliance, and pursuant to the requirements of the Insurance and Indemnification section, Contractor agrees that it shall defend, indemnify and hold County and County Indemnitees harmless from all liability, damages, costs and expenses arising from or related to a violation of such laws.

Contractor shall remain in compliance and in good standing, maintaining current and active business entity and/or nonprofit registration status, with all applicable federal, state and local registration requirements at the time of execution of the contract through the duration of the term of the Contract, and shall provide annual confirmation of current and active status to County through the term of the Contract.

20. Freight:

Prior to County's express acceptance of delivery of products. Contractor assumes full responsibility for all transportation, transportation scheduling, packing, handling, insurance, and other services associated with delivery of all products deemed necessary under Contract.

21. Severability:

If any term, covenant, condition or provision of this Contract is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired or invalidated thereby.

22. Attorney Fees:

In any action or proceeding to enforce or interpret any provision of this Contract, each party shall bear their own attorney's fees, costs and expenses.

23. Interpretation:

This Contract has been negotiated at arm's length and between persons sophisticated and knowledgeable in the matters dealt with in this Contract. In addition, each party had been represented by experienced and knowledgeable independent legal counsel of their own choosing or has knowingly declined to seek such counsel despite being encouraged and given the opportunity to do so. Each party further acknowledges that they have not been influenced to any extent whatsoever in executing this Contract by any other party hereto or by any person representing them, or both. Accordingly, any rule or law (including California Civil Code Section 1654) or legal decision that would require interpretation of any ambiguities in this Contract against the party that has drafted it is not applicable and is waived. The provisions of this Contract shall be interpreted in a reasonable manner to effect the purpose of the parties and this Contract.

24. Employee Eligibility Verification:

Contractor warrants that it fully complies with all Federal and State statutes and regulations regarding the employment of aliens and others and that all its employees performing work under this Contract meet the citizenship or alien status requirement set forth in Federal statutes and regulations. Contractor shall obtain, from all employees performing work hereunder, all verification and other documentation of employment eligibility status required by Federal or State statutes and regulations including, but not limited to, the Immigration Reform and Control Act of 1986, 8 U.S.C. §1324 et seq., as they currently exist and as they may be hereafter amended. Contractor shall retain all such documentation for all covered employees for the period prescribed by the law. Contractor shall indemnify, defend with counsel approved in writing by County, and hold harmless, County, its agents, officers, and employees from employer sanctions and any other liability which may be assessed against Contractor or County or both in connection with any alleged violation of any Federal or State statutes or regulations pertaining to the eligibility for employment of any persons performing work under this Contract.

25. Audits/Inspections:

Contractor agrees to permit County's Auditor-Controller or the Auditor-Controller's authorized representative (including auditors from a private auditing firm hired by County) access during normal working hours to all books, accounts, records, reports, files, financial records, supporting documentation, including payroll and accounts payable/receivable records, and other papers or property of Contractor for the purpose of auditing or inspecting any aspect of performance under this Contract. The inspection and/or audit will be confined to those matters connected with the performance of Contract including, but not limited to, the costs of administering Contract. County will provide reasonable notice of such an audit or inspection.

County reserves the right to audit and verify Contractor's records before final payment is made.

Contractor agrees to maintain such records for possible audit for a minimum of three years after final payment, unless a longer period of records retention is stipulated under this Contract or by law. Contractor agrees to allow interviews of any employees or others who might reasonably have information related to such records. Further, Contractor agrees to include a similar right to County to audit records and interview staff of any subcontractor related to performance of this Contract.

Should Contractor cease to exist as a legal entity, Contractor's records pertaining to this Contract shall be forwarded to County's project manager.

26. Contingency of Funds:

Contractor acknowledges that funding or portions of funding for this Contract may be contingent upon state budget approval; receipt of funds from, and/or obligation of funds by, the state of California to County; and inclusion of sufficient funding for the services hereunder in the budget approved by County's Board of Supervisors for each fiscal year covered by this Contract. If such approval, funding or appropriations are not forthcoming, or are otherwise limited, County may immediately terminate or modify this Contract without penalty.

27. Expenditure Limit:

Contractor shall notify County of Orange assigned Deputy Procurement Agent in writing when the expenditures against Contract reach 75 percent of the dollar limit on Contract. County will not be responsible for any expenditure overruns and will not pay for work exceeding the dollar limit on Contract unless a change order to cover those costs has been issued.

28. California Public Records Act:

Contractor and County agree and acknowledge that all information and documents related to the award and performance of this Contract may be subject to disclosure pursuant to the California Public Records Act, California Government Code Section 7920.000 et seq. Contractor shall not respond to any California Public Records Act request directed at County; all responses shall be handled by County.

INDEMNIFICATION AND INSURANCE PROVISIONS

1. Indemnification

Contractor agrees to indemnify, defend with counsel approved in writing by County, and hold County, its elected and appointed officials, officers, employees, agents and those special districts and agencies which County's Board of Supervisors acts as the governing Board ("County Indemnitees") harmless from any claims, demands or liability of any kind or nature, including but not limited to personal injury or property damage, arising from or related to the services, products or other performance provided by Contractor pursuant to this Contract. If judgment is entered against Contractor and County by a court of competent jurisdiction because of the concurrent active negligence of County or County Indemnitees, Contractor and County agree that liability will be apportioned as determined by the court. Neither Party shall request a jury apportionment. Notwithstanding anything stated above, nothing contained herein shall relieve Contractor of any insurance requirements of obligations created elsewhere in this Contract.

2. General Insurance Requirements

Prior to the provision of services under this Contract, the Contractor agrees to carry all required insurance at Contractor's expense, including all endorsements required herein, necessary to satisfy the County that the insurance provisions of this Contract have been complied with. Contractor agrees to keep such insurance coverage current, provide Certificates of Insurance, and endorsements to the County during the entire term of this Contract.

Contractor shall ensure that all subcontractors performing work on behalf of Contractor pursuant to this Contract shall be covered under Contractor's insurance as an Additional Insured or maintain insurance subject to the same terms and conditions as set forth herein for Contractor. Contractor shall not allow subcontractors to work if subcontractors have less than the level of coverage required by County from Contractor under this Contract. It is the obligation of Contractor to provide notice of the insurance requirements to every subcontractor and to receive proof of insurance prior to allowing any subcontractor to begin work. Such proof of insurance must be maintained by Contractor through the entirety of this Contract for inspection by County representative(s) at any reasonable time.

All self-insured retentions (SIR)'s shall be clearly stated on the Certificate of Insurance. Any SIR in excess of Five Hundred Thousand Dollars \$500,000 shall specifically be approved by the County's Risk Manager, or designee. The County reserves the right to require current financial reports from Contractor. If Contractor is self-insured, Contractor will indemnify the County for any and all claims resulting or arising from Contractor's services in accordance with the indemnity provision stated in this contract.

If the Contractor fails to maintain insurance acceptable to the County for the full term of this Contract, the County may terminate this Contract.

Qualified Insurer

The policy or policies of insurance must be issued by an insurer with a minimum rating of A- (Secure A.M. Best's Rating) and VIII (Financial Size Category as determined by the most current edition of the **Best's Key Rating Guide/Property-Casualty/United States or ambest.com**). It is preferred, but not mandatory, that the insurer be licensed to do business in the state of California (California Admitted Carrier).

If the insurance carrier does not have an A.M. Best Rating of A-/VIII, the CEO/Office of Risk Management retains the right to approve or reject a carrier after a review of the company's performance and financial ratings.

The policy or policies of insurance maintained by the Contractor shall provide the minimum limits and coverage as set forth below.

Increased insurance limits may be satisfied with Excess/Umbrella policies. Excess/Umbrella policies when required must provide Follow Form coverage.

All insurance policies required by this Contract shall waive all rights of subrogation against the **County of Orange, its elected and appointed officials, officers, employees, and agents** when acting within the scope of their appointment or employment.

Contractor shall provide thirty (30) days prior written notice to the County of any policy cancellation or non-renewal and ten (10) days prior written notice where cancellation is due to non-payment of premium and provide a copy of the cancellation notice to County. Failure to provide written notice of cancellation

may constitute a material breach of the Contract, upon which the County may suspend or terminate this Contract.

Insurance certificates should be forwarded to the agency/department address listed on the solicitation.

If the Contractor fails to provide the insurance certificates and endorsements within ten (10) days of notification by CEO/Procurement or the agency/department procurement division, award may be made to the next qualified vendor.

County expressly retains the right to require Contractor to increase or decrease insurance of any of the above insurance types throughout the term of this Contract. Any increase or decrease in insurance will be as deemed by County of Orange Risk Manager as appropriate to adequately protect County.

County shall notify Contractor in writing of changes in the insurance requirements. If Contractor does not provide acceptable Certificates of Insurance and endorsements to County incorporating such changes within thirty (30) days of receipt of such notice, this Contract may be in breach without further notice to Contractor, and County shall be entitled to all legal remedies.

The procuring of such required policy or policies of insurance shall not be construed to limit Contractor's liability hereunder nor to fulfill the indemnification provisions and requirements of this Contract, nor act in any way to reduce the policy coverage and limits available from the insurer.

3. Commercial General Liability

Minimum limits and coverage

\$1,000,000 per occurrence; \$2,000,000 aggregate

Required Coverage Forms

The Commercial General Liability coverage shall be written on occurrence basis utilizing Insurance Services Office (ISO) form CG 00 01, or a substitute form providing liability coverage at least as broad.

Required Endorsements

The Commercial General Liability policy shall contain the following endorsements, which shall accompany the Certificate of Insurance:

- A. An Additional Insured endorsement using ISO form CG 20 26 04 13, or a form at least as broad naming the County of Orange its elected and appointed officials, officers, employees, and agents as Additional Insureds, or provide blanket coverage, which will state As Required by Written Contract.
- B. A primary non-contributory endorsement using ISO form CG 20 01 04 13, or a form at least as broad evidencing that the Contractor's insurance is primary, and any insurance or self-insurance maintained by the County shall be excess and non-contributing.

The Commercial General Liability policy shall contain a severability of interests clause also known as a "separation of insureds" clause (standard in the ISO CG 0001 policy).

4. Automobile Liability including coverage for owned, non-owned and hired vehicles

Minimum limits and coverage

\$1,000,000 combined Single Limit

Required Coverage Forms

The Business Auto Liability coverage shall be written on ISO form CA 00 01, CA 00 05, CA 0012, CA 00 20, or a substitute form providing coverage at least as broad.

5. Workers' Compensation

Minimum limits and coverage

Statutory

Required Endorsements

The Workers' Compensation policy shall contain a waiver of subrogation endorsement waiving all rights of subrogation against the *County of Orange, its elected and appointed officials, officers, agents, and employees* or provide blanket coverage, which will state *As Required by Written Contract*.

6. Employers Liability Insurance

Minimum limits and coverage

\$1,000,000 per accident or disease

7. Accountants Liability

\$1,000,000 per claims-made or occurrence; \$1,000,000 aggregate

If Contractor's Accountants Liability, Technology Errors & Omissions and/or Network Security & Privacy Liability are "Claims-Made" policy(ies), Contractor shall agree to the following:

- 1) The retroactive date must be shown and must be before the date of the Contract or the beginning of the Contract services.
- 2) Insurance must be maintained, and evidence of insurance must be provided for at least three (3) years after expiration or earlier termination of Contract services.
- 3) If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the effective date of the contract services, Contractor must purchase an extended reporting period for a minimum of three (3) years after expiration of earlier termination of the Contract.

ADDITIONAL TERMS AND CONDITIONS

1. Scope of Contract:

This Contract specifies contractual terms and conditions by which County will procure Independent Risk Assessment Items from Contractor as further detailed in the Scope of Work, identified and incorporated herein by this reference as "Attachment A".

2. Term of Contract:

This Contract shall commence upon execution of all necessary signatures and continue through April 30, 2026, unless otherwise terminated by County.

3. Renewal:

This contract shall not be renewed unless otherwise approved by the County Board of Supervisors.

4. Adjustments – Scope of Work:

No adjustments made to the Scope of Work will be authorized without prior written approval of County assigned Deputy Procurement Agent (DPA).

5. Bills and Liens:

Contractor shall pay promptly all indebtedness for labor, materials and equipment used in performance of the work. Contractor shall not permit any lien or charge to attach to the work or the premises, but if any does so attach, Contractor shall promptly procure its release and, in accordance with the requirements of Article "Indemnification" above, indemnify, defend, and hold County harmless and be responsible for payment of all costs, damages, penalties and expenses related to or arising from or related thereto.

6. Breach of Contract:

The failure of Contractor to comply with any of the provisions, covenants or conditions of this Contract shall be a material breach of this Contract. In such event County may, and in addition to any other remedies available at law, in equity, or otherwise specified in this Contract:

- A. Terminate Contract immediately, pursuant to the General Terms and Conditions section, "Termination" Article herein;
- B. Afford Contractor written notice of the breach and ten (10) calendar days or such shorter time that may be specified in this Contract within which to cure the breach;
- C. Discontinue payment to the Contractor for and during the period in which Contractor is in breach; and
- D. Offset against any monies billed by Contractor but yet unpaid by County those monies disallowed pursuant to the above.

7. Civil Rights:

Contractor attests that services provided shall be in accordance with the provisions of Title VI and Title VII of the Civil Rights Act of 1964, as amended, Section 504 of the Rehabilitation Act of 1973, as amended; the Age Discrimination Act of 1975 as amended; Title II of the Americans with Disabilities Act of 1990, and other applicable State and federal laws and regulations prohibiting discrimination on the basis of race, color, national origin, ethnic group identification, age, religion, marital status, sex or disability.

8. Conflict of Interest – Contractor’s Personnel:

Contractor shall exercise reasonable care and diligence to prevent any actions or conditions that could result in a conflict with the best interests of County. This obligation shall apply to Contractor, Contractor’s officers, directors, employees, agents, and subcontractors associated with accomplishing work and services hereunder. Contractor’s efforts shall include, but not be limited to establishing precautions to prevent its employees, agents, and subcontractors from providing or offering gifts, entertainment, payments, loans or other considerations which could be deemed to influence or appear to influence County staff or elected officers from acting in the best interests of County.

Contractor shall notify County, in writing, of any potential or actual conflicts of interest between Contractor and County that may arise prior to, or during the period of, Contract performance, including, but not limited to, whether any known County public officer’s child is an officer or director of, or has an ownership interest of ten (10) percent or more in, Contractor. While Contractor will be required to provide this information without prompting from County any time there is a change regarding conflict of interest, Contractor must also provide an update to County upon request by County.

9. Conflict of Interest – County Personnel:

County of Orange Board of Supervisors policy prohibits its employees from engaging in activities involving a conflict of interest. Contractor shall not, during the period of this Contract, employ any County employee for any purpose.

10. W-9/W-8 Requirements:**Department of the Treasury, Internal Revenue Service Form W-9 Requirement:**

Effective June 3, 2006, all Contractors, entering into a contract with the County, who are not already established in the County Financial System as an Auditor-Controller Vendor, will be required to submit to the County a federal Form W-9, or form W-8 for foreign vendors. The County will inform the Contractor, at the time of award, if the Form W-9, or W-8, will be required.

- A. In order to comply with this County requirement, within ten days of notification of selection of award of Contract but prior to official award of Contract, the selected Contractor agrees to furnish to the contract administrator, the County DPA, the required W-9 or W-8. *Out of State Vendors may be required to submit a 587/590 Form.*

11. Contractor’s Project Manager and Key Personnel:

Contractor shall appoint a Project Manager to direct Contractor’s efforts in fulfilling Contractor’s obligations under this Contract. This Project Manager shall be subject to approval by County and shall not

be changed without the written consent of County's Project Manager, which consent shall not be unreasonably withheld.

Contractor's Project Manager shall be assigned to this project for the duration of Contract and shall diligently pursue all work and services to meet the project time lines. County's Project Manager shall have the right to require the removal and replacement of Contractor's Project Manager from providing services to County under this Contract. County's Project manager shall notify Contractor in writing of such action. Contractor shall accomplish the removal within five (5) business days after written notice by County's Project Manager. County's Project Manager shall review and approve the appointment of the replacement for Contractor's Project Manager. County is not required to provide any additional information, reason or rationale in the event it requires the removal of Contractor's Project Manager from providing further services under Contract.

12. Conditions Affecting Work:

Contractor shall be responsible for taking all steps reasonably necessary to ascertain the nature and location of the work to be performed under this Contract and to know the general conditions which can affect the work or the cost thereof. Any failure by Contractor to do so will not relieve Contractor from responsibility for successfully performing the work without additional cost to County. County assumes no responsibility for any understanding or representations concerning the nature, location(s) or general conditions made by any of its officers or agents prior to the execution of this Contract, unless such understanding or representations by County are expressly stated in Contract.

13. Data – Title To:

All materials, documents, data or information obtained from County data files or any County medium furnished to Contractor in the performance of this Contract will at all times remain the property of County. Such data or information may not be used or copied for direct or indirect use by Contractor after completion or termination of this Contract without the express written consent of County. All materials, documents, data or information, including copies, must be returned to County at the end of this Contract.

14. Default – Re-Procurement Costs:

In case of Contract breach by Contractor, resulting in termination by County, County may procure the commodities and services from other sources. If the cost for those commodities and services is higher than under the terms of the existing Contract, Contractor will be responsible for paying County the difference between Contract cost and the price paid, and County may deduct this cost from any unpaid balance due Contractor. The price paid by County shall be the prevailing market price at the time such purchase is made. This is in addition to any other remedies available under this Contract and under law.

15. Disputes – Contract:

The parties shall deal in good faith and attempt to resolve potential disputes informally. If the dispute concerning a question of fact arising under the terms of this Contract is not disposed of in a reasonable period of time by the Contractor's Project Manager and the County's Project Manager, as specified in Article titled "Notices" below, such matter shall be brought to the attention of the County DPA by way of the following process:

- A. The Contractor shall submit to the agency/department assigned Deputy Procurement Agent a written demand for a final decision regarding the disposition of any dispute between the parties arising under, related to, or involving this Contract, unless County, on its own initiative, has already rendered such a final decision.
- B. The Contractor's written demand shall be fully supported by factual information, and, if such demand involves a cost adjustment to Contract, Contractor shall include with the demand a written statement signed by a senior official indicating that the demand is made in good faith, that the supporting data are accurate and complete, and that the amount requested accurately reflects Contract adjustment for which Contractor believes County is liable.

Pending the final resolution of any dispute arising under, related to, or involving this Contract, Contractor agrees to diligently proceed with the performance of this Contract, including the delivery of commodities and/or provision of services. Contractor's failure to diligently proceed shall be considered a material breach of this Contract.

Any final decision of County shall be expressly identified as such, shall be in writing, and shall be signed by County Deputy Procurement Agent or his designee. If County fails to render a decision within 90 days after receipt of Contractor's demand, it shall be deemed a final decision adverse to Contractor's contentions. Nothing in this section shall be construed as affecting County's right to terminate Contract for cause or termination for convenience as stated in Article "Termination" herein.

16. Drug-Free Workplace:

Contractor hereby certifies compliance with Government Code Section 8355 in matters relating to providing a drug-free workplace. Contractor will:

- A. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations, as required by Government Code Section 8355(a)(1).
- B. Establish a drug-free awareness program as required by Government Code Section 8355(a)(2) to inform employees about all of the following:
 - 1. The dangers of drug abuse in the workplace;
 - 2. The organization's policy of maintaining a drug-free workplace
 - 3. Any available counseling, rehabilitation and employee assistance programs; and
 - 4. Penalties that may be imposed upon employees for drug abuse violations.
- C. Provide as required by Government Code Section 8355(a)(3) that every employee who works under this Contract:
 - 1. Will receive a copy of the company's drug-free policy statement; and
 - 2. Will agree to abide by the terms of the company's statement as a condition of employment under this Contract.

D. Failure to comply with these requirements may result in suspension of payments under Contract or termination of Contract or both, and Contractor may be ineligible for award of any future County contracts if County determines that any of the following has occurred:

1. Contractor has made false certification, or
2. Contractor violates the certification by failing to carry out the requirements as noted above.

17. EDD Independent Contractor Reporting Requirements:

Effective January 1, 2001, County of Orange is required to file in accordance with subdivision (a) of Section 6041A of the Internal Revenue Code for services received from a “service provider” to whom County pays \$600 or more or with whom County enters into a contract for \$600 or more within a single calendar year. The purpose of this reporting requirement is to increase child support collection by helping to locate parents who are delinquent in their child support obligations.

The term “service provider” is defined in California Unemployment Insurance Code Section 1088.8, subparagraph B.2 as “an individual who is not an employee of the service recipient for California purposes and who received compensation or executes a contract for services performed for that service recipient within or without the state.” The term is further defined by the California Employment Development Department to refer specifically to independent Contractors. An independent Contractor is defined as “an individual who is not an employee of the ... government entity for California purposes and who receives compensation or executes a contract for services performed for that ... government entity either in or outside of California.”

The reporting requirement does not apply to corporations, general partnerships, limited liability partnerships, and limited liability companies.

Additional information on this reporting requirement can be found at the California Employment Development Department website located at http://www.edd.ca.gov/Employer_Services.htm

The failure of Contractor to timely submit the requested data shall constitute a material breach and grounds for termination of this Contract.

18. Error and Omissions:

All reports, files and other documents prepared and submitted by Contractor shall be complete and shall be carefully checked by the professional(s) identified by Contractor as Project Manager and key personnel attached hereto, prior to submission to the County. Contractor agrees that County review is discretionary, and Contractor shall not assume that the County will discover errors and/or omissions. If the County discovers any errors or omissions prior to approving Contractor’s reports, files and other written documents, the reports, files or documents will be returned to Contractor for correction. Should the County or others discover errors or omissions in the reports, files or other written documents submitted by the Contractor after County approval thereof, County approval of Contractor’s reports, files or documents shall not be used as a defense by Contractor in any action between the County and Contractor, and the reports, files or documents will be returned to Contractor for correction.

19. Equal Employment Opportunity:

Contractor shall comply with U.S. Executive Order 11246 entitled, "Equal Employment Opportunity" as amended by Executive Order 11375 and as supplemented in Department of Labor regulations (41 CFR, Part 60) and applicable state of California regulations as may now exist or be amended in the future. Contractor shall not discriminate against any employee or applicant for employment on the basis of race, color, national origin, ancestry, religion, sex, marital status, political affiliation or physical or mental condition.

Regarding handicapped persons, Contractor will not discriminate against any employee or applicant for employment because of physical or mental handicap in regard to any position for which the employee or applicant for employment is qualified. Contractor agrees to provide equal opportunity to handicapped persons in employment or in advancement in employment or otherwise treat qualified handicapped individuals without discrimination based upon their physical or mental handicaps in all employment practices such as the following: employment, upgrading, promotions, transfers, recruitments, advertising, layoffs, terminations, rate of pay or other forms of compensation, and selection for training, including apprenticeship. Contractor agrees to comply with the provisions of Sections 503 and 504 of the Rehabilitation Act of 1973, as amended, pertaining to prohibition of discrimination against qualified handicapped persons in all programs and/or activities as detailed in regulations signed by the Secretary of the Department of Health and Human Services effective June 3, 1977, and found in the Federal Register, Volume 42, No. 68 dated May 4, 1977, as may now exist or be amended in the future.

Regarding Americans with disabilities, Contractor agrees to comply with applicable provisions of Title 1 of the Americans with Disabilities Act enacted in 1990 as may now exist or be amended in the future.

20. Headings:

The various headings and numbers herein, the grouping of provisions of this Contract into separate clauses and articles, and the organization hereof are for the purpose of convenience only and shall not limit or otherwise affect the meaning hereof.

21. News/Information Release:

Contractor agrees that it will not issue any news releases in connection with either the award of this Contract or any subsequent amendment of or effort under this Contract without first obtaining review and written approval of said news releases from County through County's Project Manager.

22. Precedence:

Contract documents consist of this Contract and its exhibits and attachments. In the event of a conflict between or among Contract documents, the order of precedence shall be the provisions of the main body of this Contract, i.e., those provisions set forth in the recitals and articles of this Contract, and then the exhibits and attachments.

23. Subcontracting:

No performance of this Contract or any portion thereof may be subcontracted or otherwise delegated by Contractor, in whole or in part, without first obtaining the prior express written consent of County. Any attempt by Contractor to subcontract or delegate any performance of this Contract without the prior express

written consent of County shall be invalid and shall constitute a material breach of this Contract, and any attempted assignment or delegation in derogation of this paragraph shall be void.

In the event that Contractor is authorized by County to subcontract, this Contract shall take precedence over the terms of the agreement between Contractor and subcontractor, and any agreement between Contractor and a subcontractor shall incorporate by reference the terms of this Contract. Contractor shall remain responsible for the performance of this Contract and indemnification of County notwithstanding the County's consent to Contractor's request for approval of a subcontractor. Under no circumstances shall County be required to directly monitor the performance of any subcontractor. All work performed by a subcontractor must be monitored by Contractor and must meet the approval of the County of Orange pursuant to the terms of this Contract.

24. Termination – Orderly:

After receipt of a termination notice from County of Orange, Contractor may submit to County a termination claim, if applicable. Such claim shall be submitted promptly, but in no event later than 60 days from the effective date of the termination, unless one or more extensions in writing are granted by County upon written request of Contractor. Upon termination County agrees to pay Contractor for all services performed prior to termination which meet the requirements of Contract, provided, however, that such compensation combined with previously paid compensation shall not exceed the total compensation set forth in Contract. Upon termination or other expiration of this Contract, each party shall promptly return to the other party all papers, materials, and other properties of the other held by each for purposes of performance of Contract.

25. Usage:

No guarantee is given by County to Contractor regarding usage of this Contract. Usage figures, if provided, are approximations. Contractor agrees to supply services and/or commodities requested, as needed by County of Orange, at rates/prices listed in Contract, regardless of quantity requested.

26. Usage Reports:

Contractor shall submit usage reports on an annual basis to the assigned Deputy Procurement Agent of County of Orange user agency/department. The usage report shall be in a format specified by the user agency/department and shall be submitted 90 days prior to the expiration date of Contract term, or any subsequent renewal term, if applicable.

27. Project Manager, County:

The County shall appoint a Project Manager to act as liaison between the County and the Contractor during the term of this Contract. The County's Project Manager shall coordinate the activities of the County staff assigned to work with the Contractor.

The County's Project Manager shall have the right to require the removal and replacement of the Contractor's Project Manager and key personnel. The County's Project Manager shall notify the Contractor in writing of such action. The Contractor shall accomplish the removal within three (3) business days after written notice from the County's Project Manager. The County's Project Manager shall review and approve the appointment of the replacement for the Contractor's Project Manager and key personnel. Said approval shall not be unreasonably withheld. The County is not required to provide any additional information,

reason or rationale in the event it requires the removal of Contractor's Project Manager from providing further services under the Contract.

28. Mandatory Kick-Off Meeting:

Upon award of the contract, the awarded vendor(s) may be required to attend a mandatory kick-off meeting with County representatives to discuss important information related to the scope of work, the contract, and the invoice payment process. Check-in meetings may be required to review any issues with the contract.

29. Permits and Licenses:

Contractor shall be required to obtain any and all approvals, permits and/or licenses which may be required in connection with the permitted operation as set out herein. No permit approval or consent given hereunder by County in its governmental capacity shall affect or limit Contractor's obligations hereunder, nor shall any approvals or consents given by County as a party to this Contract, be deemed approval as to compliance or conformance with applicable governmental codes, laws, ordinances, rules, or regulations.

30. Inventory:

County has an ongoing requirement for the commodities indicated in this Contract. Contractor shall maintain a reasonable stock on hand of all commodities for delivery upon request.

31. Order Dates:

Orders may be placed during the term of Contract even if delivery may not be made until after the term of Contract. Order dates take precedence over delivery dates. Contract must clearly identify the order date on all invoices to County.

32. Notices:

Any and all notices, requests demands and other communications contemplated, called for, permitted, or required to be given hereunder shall be in writing with a copy provided to the assigned DPA, except through the course of the Parties' Project Managers' routine exchange of information and cooperation during the terms of the work and services. Any written communications shall be deemed to have been duly given upon actual in-person delivery, if delivery is by direct hand, or upon delivery on the actual day of receipt or no greater than four (4) calendar days after being mailed by US certified or registered mail, return receipt requested, postage prepaid, whichever occurs first. The date of mailing shall count as the first day. All communications shall be addressed to the appropriate party at the address stated herein or such other address as the Parties hereto may designate by written notice from time to time in the manner aforesaid.

Contractor:	Macias Gini & O'Connell LLP	
Attn:	Linda Hurley Contract Manager	Kyle O'Rourke Project Manager
Local Address:	111 Pacifica Ste 300 Irvine, CA 92618	
Headquarters Address:	500 Capitol Mall, Suite 2200 Sacramento, CA 95814	
Email:	lhurley@mgocpa.com	KOrourke@mgocpa.com

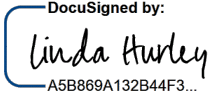
County's Project Manager: Internal Audit Department	
Attn:	Michael Dean
Address:	601 N. Ross Street Santa Ana, CA 92701
Phone:	(714) 834-4101
Email:	Michael.Dean@iad.oc.gov

cc: County Executive Office - CPO/Procurement Services	
Attn:	David Mojarro, County DPA
Address:	400 West Civic Center Drive, 5th Floor Santa Ana, CA 92701
Phone:	(714) 567-5025
Email:	david.mojarro@ceo.oc.gov

SIGNATURE PAGE

IN WITNESS WHEREOF, the Parties hereto have executed this Contract on the date following their respective signatures.

Macias Gini & O'Connell LLP, a State Of California Partnership

DocuSigned by:

A5B869A132B44F3...

Linda Hurley

Partner

9/11/2025

Signature

Name

Title

Date

COUNTY OF ORANGE, a political subdivision of the State of California

COUNTY AUTHORIZED SIGNATURE:

Deputy Procurement Agent

Signature

Name

Title

Date

APPROVED AS TO FORM:

County Counsel

By:

DocuSigned by:

C44B73F6A6EE416...

Deputy

Name:

Ronnie Magsaysay

Date:

9/12/2025

* If the contracting party is a corporation, (2) two signatures are required: one (1) signature by the Chairman of the Board, the President or any Vice President; and one (1) signature by the Secretary, any Assistant Secretary, the Chief Financial Officer or any Assistant Treasurer. The signature of one person alone is sufficient to bind a corporation, as long as he or she holds corporate offices in each of the two categories described above. For County purposes, proof of such dual office holding will be satisfied by having the individual sign the instrument twice, each time indicating his or her office that qualifies under the above described provision. In the alternative, a single corporate signature is acceptable when accompanied by a corporate resolution demonstrating the legal authority of the signee to bind the corporation.

ATTACHMENT A - SCOPE OF WORK

PROJECT DEFINITION

On June 24, 2025, the Board of Supervisors approved the Internal Audit Department's (IAD) Fiscal Year (FY) 2025-26 Annual Risk Assessment & Audit Plan. The Board of Supervisors also approved a recommendation from the Audit Oversight Committee to direct IAD to contract with a reputable Certified Public Accounting (CPA) firm that is already approved by County procurement, to conduct an independent risk assessment by October 31, 2025, for use in modifying its FY 2025-26 Audit Plan to incorporate audits of high-risk areas identified in the independent risk assessment, and for use in developing its FY 2026-27 Audit Plan.

BACKGROUND

The County is comprised of 22 departments and over 18,000 employees. The County's core businesses are public safety, public health, environmental protection, regional planning, public assistance, social services, and aviation.

IAD supports and assists the Board of Supervisors and County management in the realization of their business goals and objectives by testing and reporting on the effectiveness of County internal control systems and efficiency of business processes; or by examining the efficiency and effectiveness of County programs, functions, or operations. County management relies on these systems and processes for safeguarding the County's assets and resources, reasonable and prudent financial stewardship, accurate recording and reporting, and achieving the County's goals and objectives. IAD is not responsible for mandated audits that the Auditor-Controller (A-C) performs, including audits and reviews of the Treasurer's schedule of assets and Probation's Juvenile Records.

IAD prepared its FY 2025-26 Annual Risk Assessment & Audit Plan that details audits to be completed in the upcoming year. The Board of Supervisors approved IAD's FY 2025-26 Annual Risk Assessment & Audit Plan on June 24, 2025, and also directed IAD to contract with a reputable CPA firm to conduct an independent risk assessment by October 31, 2025, for use in modifying IAD's FY 2025-26 Audit Plan and developing its FY 2026-27 Audit Plan.

SCOPE AND OBJECTIVES

The objective is to conduct an independent risk assessment by October 31, 2025, for use in modifying IAD's FY 2025-26 Audit Plan to incorporate audits of high-risk areas identified in the independent risk assessment, and for use in developing its FY 2026-27 Audit Plan.

DELIVERABLES

The Contractor will prepare and submit to the Internal Audit Department Director agreed-upon deliverables as outlined below. Deliverables must be produced consistent with applicable industry and professional standards. If the County rejects any final report or deliverable, the County must notify the Contractor in writing of the reason for the rejection. The Contractor will have ten calendar days from date of receipt of notification to correct the deficiencies and resubmit the report or deliverable. Failure to submit acceptable work within the ten calendar days shall constitute a breach of the contract. The County will not compensate the Contractor for time spent on revisions due to incorrect and/or poorly prepared written deliverables:

Risk Assessment Notification Letter – the Contractor will provide a Risk Assessment Notification Letter to IAD and the Project Officer before commencing the project. The Letter shall introduce and describe the risk assessment process and methodology, including specific steps to be performed, and provide any other relevant information.

Biweekly Status Reports – the Contractor will prepare and submit to the County written bi-weekly status reports regarding the status of the risk assessment including:

- Status Summary.
- Risk Assessment steps completed, in progress, and not started.
- Issues and Risks, if any, including planned mitigating actions.

Draft Risk Assessment – before finalization, the Contractor will provide IAD and the Project Officer a Draft Risk Assessment for review. The Contractor shall ensure the Risk Assessment identifies high-risk audit areas for IAD to consider in modifying its FY 2025-26 Audit Plan and developing its FY 2026-27 Audit Plan.

Final Risk Assessment– The Contractor will finalize and submit the Risk Assessment to the Project Officer.

MEETINGS

Entrance Conference

Within five days after issuance of the contract, the Contractor will provide the Project Officer with available dates for an entrance conference for the project that includes the Contractor and the County's Internal Audit staff. The Contractor will use the Entrance Conference to mark the official beginning of the project; introduce team members; and brief the Internal Audit staff on the risk assessment process and methodology.

Exit Conference

Before the draft Risk Assessment and Audit Plan is formally sent to the Project Officer, the Contractor will provide the Project Officer with available dates for an exit conference that includes the Contractor, the County's Internal Audit Staff, and/or other employee(s) deemed necessary by the Project Officer.

MILESTONE DATES

The milestone deadlines for each deliverable and meeting are noted below:

- 1.Biweekly Status Reports: 14 days after contract award and every subsequent 14 days until project completion.
- 2.Risk Assessment Notification Letter: October 1, 2025.
- 3.Entrance Conference: October 8, 2025.
- 4.Exit Conference: October 31, 2025.
- 5.Draft Risk Assessment: November 7, 2025.
- 6.Final Risk Assessment: November 30, 2025.

SUBMISSION OF DELIVERABLES

The Contractor will submit deliverables to:

Internal Audit Department
Aggie Alonso, Director
Jose Olivo, Deputy Director
601 N Ross Street Suite 528
Santa Ana, CA 92701
aggie.alonso@iad.oc.gov
jose.olivo@iad.oc.gov

ASSUMPTIONS

Perform a county-wide internal audit risk assessment, including the following activities:

- Review of key documents, including budgets and capital programs, audited financial reports, strategy documents, long range plans, and other key documents.
- Up to 24 1-hour interviews with County leadership, executive staff, department directors, and other management.
- Up to 12 hours of discussions and interviews with elected officials.
- Survey to other desired participants (e.g., other executive management or mid-management). Note that the survey will be limited to ten questions. MGO plans to send 3 communications associated with the survey – announcement, reminder, final reminder. We do not plan on extending the deadline or performing significant outreach to encourage participation. MGO will kindly request that the County assist in communicating the importance and following-up, if needed, with their staff to encourage survey participation.
- Feedback on the report to be provided by Orange County staff:
 - Provide two ‘virtual office hour’ sessions, totaling 8 hours, to allow for management to provide feedback.
 - Allow written feedback at one time from management in response to the risk assessment matrix and recommended audit plan.
- The level of effort will be limited to 550 hours.
- Interviews and data requests will be performed within the scheduled and agreed upon timelines.
- MGO will prepare one draft and one final report for each deliverable (risk assessment and audit plan).

ATTACHMENT B - PAYMENT AND COMPENSATION

1. Compensation:

This is a firm fixed fee Contract between County and Contractor for Independent Risk Assessment as set forth in Attachment A, “Scope of Work”.

Contractor agrees to accept the specified compensation as set forth in this Contract as full payment for performing all services and furnishing all staffing and materials required, for any reasonably unforeseen difficulties which may arise or be encountered in the execution of the services until acceptance, for risks connected with the services, and for performance by Contractor of all its duties and obligations hereunder. Contractor shall only be compensated as set forth herein for work performed in accordance with the Scope of Work. **County shall have no obligation to pay any sum in excess of the fixed rates specified herein unless authorized by amendment in accordance with Articles "Changes" and "Amendments" of County Contract Terms and Conditions, which may require approval by the County Board of Supervisors.**

2. Fees and Charges:

A. County will pay the fees and charges in accordance with the provisions of this Contract. Payment shall be as follows:

Milestone Deliverables	Deliverable Description	% of Contract
1	Biweekly Status Reports	0%
2	Risk Assessment Notification Letter	0%
3	Entrance Conference	20%
4	Exit Conference	40%
5	Draft Risk Assessment	20%
6	Final Risk Assessment	20%
Total		100%

B. Total Contract amount not to exceed:.....129,500.00

Approval by the Board of Supervisors is required for all service contract contracts where for any year of the contract, the annual value to any one contractor exceeds \$200,000

Approval by the Board of Supervisors is required for all service contracts where the total contract value exceeds or is anticipated to exceed \$1,000,000 when all contract years are taken into consideration for multi-year contracts.

3. Price Increase/Decreases:

No price increases will be considered during the first term of the Contract. County requires documented proof of cost increases on Contracts prior to any price adjustment. A minimum of 30-days advance notice in writing is required for consideration of such adjustment. No retroactive price adjustments will be considered. All price decreases will automatically be extended to County of Orange. County may enforce,

negotiate, or cancel escalating price Contracts or take any other action it deems appropriate, as it sees fit. The net dollar amount of profit will remain firm during the period of Contract. Adjustments increasing Contractor's profit will not be allowed.

4. Firm Discount and Pricing Structure:

Contractor guarantees that prices quoted are equal to or less than prices quoted to any other local, State or Federal government entity for services of equal or lesser scope. Contractor agrees that no price increases shall be passed along to County during the term of this Contract not otherwise specified and provided for within this Contract.

5. Contractor's Expense:

Contractor will be responsible for all costs related to photocopying, telephone communications and fax communications while on County sites during the performance of work and services under this Contract.

6. Payment Terms – Payment in Arrears:

Invoices are to be submitted in **arrears** to the user agency/department to the ship-to address, unless otherwise directed in this Contract. Contractor shall reference Contract number on invoice. Payment will be net thirty (30) days after receipt of an invoice in a format acceptable to County of Orange and verified and approved by the agency/department and subject to routine processing requirements. The responsibility for providing an acceptable invoice rests with Contractor.

Billing shall cover services and/or goods not previously invoiced. Contractor shall reimburse County of Orange for any monies paid to Contractor for goods or services not provided or when goods or services do not meet Contract requirements.

Payments made by the County shall not preclude the right of the County from thereafter disputing any items or services involved or billed under this Contract and shall not be construed as acceptance of any part of the goods or services.

7. Payment – Invoicing Instructions:

Payment – Invoicing Instructions: The Contractor will provide an invoice on the Contractor's letterhead for goods delivered and/or services rendered. In the case of goods, the Contractor will leave an invoice with each delivery. Each invoice will have a number and will include the following information:

- a. Contractor's name and address
- b. Contractor's remittance address, if different from "A" above
- c. Name of County Agency/Department
- d. Delivery/Service address
- e. CT-017-26010208
- f. Date of order
- g. Product/Service description, quantity, and prices

- h. Sales tax, if applicable
- i. Freight/Delivery Charges, if applicable
- j. Total

Invoices and support documentation are to be forwarded to:

Internal Audit Department

Attn: Gabriela Cabrera

601 N. Ross Street Suite 528

Santa Ana, CA 92701

Email: Gabriela.Cabrera@iad.oc.gov; Michael.Dean@iad.oc.gov

8. Payment (Electronic Funds Transfer (EFT)):

County of Orange offers contractors the option of receiving payment directly to their bank account via an Electronic Fund Transfer (EFT) process in lieu of a check payment. Payment made via EFT will also receive an Electronic Remittance Advice with the payment details via e-mail. An e-mail address will need to be provided to The County of Orange via an EFT Authorization Form. To request a form, please contact the agency/department Procurement Buyer listed in Contract. Upon completion of the form, please mail, fax or email to the address or phone listed on the form.

Contract Summary Form

OC Expediter Requisition #: 1765045

Macias Gini & O'Connell, LLP

SUMMARY OF SIGNIFICANT CHANGES

1. Scope of Work: Independent Risk Assessment
2. Costs: One-time cost of \$129,500.00

SUBCONTRACTORS

This contract does not include subcontractors or pass through to other providers.

CONTRACT OPERATING EXPENSES

The contract payments are based on completed milestones and are defined as follows:

Milestone Deliverable	Deliverable Dates	Payment Terms % of Contract
Biweekly Status Reports	14 days after contract award and every subsequent 14 days until project completion.	0%
Risk Assessment Notification Letter	October 1, 2025	0%
Entrance Conference	October 8, 2025	20%
Exit Conference	October 31, 2025	40%
Draft Risk Assessment	November 7, 2025	20%
Final Risk Assessment	November 30, 2025	20%

ORANGE COUNTY BOARD OF SUPERVISORS

MINUTE ORDER

June 24, 2025

Submitting Agency/Department: Internal Audit

Receive and file Executive Summary of Internal Audit Reports for January - March 2025; approve Annual Risk Assessment & Audit Plan, FY 2025-26; and direct Department to contract with a reputable Certified Public Accounting firm to conduct independent risk assessment by October 31, 2025 for use in modifying FY 2025-26 Audit Plan to incorporate audits of high risk areas and develop FY 2026-27 Audit Plan - All Districts

The following is action taken by the Board of Supervisors:

APPROVED AS RECOMMENDED ☒ OTHER ☐

Unanimous ☒ (1) NGUYEN: Y (2) SARMIENTO: Y (3) WAGNER: Y (4) CHAFFEE: Y (5) FOLEY: Y

Vote Key: Y=Yes; N=No; A=Abstain; X=Excused; B.O.=Board Order

Documents accompanying this matter:

- ☐ Resolution(s)
- ☐ Ordinances(s)
- ☐ Contract(s)

Item No. 20

Special Notes:

Copies sent to:

*Internal Audit –
Aggie Alonso
Jose A. Olivo*

6/27/25



I certify that the foregoing is a true and correct copy of the Minute Order adopted by the Board of Supervisors, Orange County, State of California.
Robin Stieler, Clerk of the Board

By: _____

Deputy

Agenda Item

AGENDA STAFF REPORT



ASR Control 25-000454

MEETING DATE: 06/24/25

LEGAL ENTITY TAKING ACTION: Board of Supervisors

BOARD OF SUPERVISORS DISTRICT(S): All Districts

SUBMITTING AGENCY/DEPARTMENT: Internal Audit (Approved)

DEPARTMENT CONTACT PERSON(S): Aggie Alonso (714) 834-5442
Jose A. Olivo (714) 834-5509

SUBJECT: Internal Audit Department Status Report and Annual Risk Assessment & Audit Plan

CEO CONCUR Concur	COUNTY COUNSEL REVIEW No Legal Objection	CLERK OF THE BOARD Consent Calendar 3 Votes Board Majority
Budgeted: N/A	Current Year Cost: N/A	Annual Cost: N/A
Staffing Impact: No	# of Positions:	Sole Source: N/A
Current Fiscal Year Revenue: N/A	County Audit in last 3 years: No	
Funding Source: N/A		
Levine Act Review Completed: N/A		
Prior Board Action:	03/25/2025 #7; 06/25/2024 #15	

RECOMMENDED ACTION(S):

1. Receive and file Internal Audit Department's Executive Summary of Internal Audit Reports for the Quarter Ended March 31, 2025.
2. Approve Internal Audit Department's Fiscal Year 2025-26 Annual Risk Assessment & Audit Plan.
3. Direct Internal Audit Department to contract with a reputable Certified Public Accounting firm that is already approved by County procurement to conduct an independent risk assessment by October 31, 2025, for use in modifying the Fiscal Year 2025-26 Audit Plan to incorporate audits of high-risk areas identified in the independent risk assessment, and for use in developing the Fiscal Year 2026-27 Audit Plan, as recommended by the Audit Oversight Committee.

SUMMARY:

The Executive Summary of Internal Audit Reports is provided to inform the Board of Supervisors (Board) of the ongoing progress of internal audit coverage, approval of the Fiscal Year (FY) 2025-26 Annual Risk Assessment and Audit Plan authorizes the Internal Audit Department (IAD) to proceed with specified audits, and approval of the Audit Oversight Committee recommendation directs IAD to contract with a CPA firm, approved by County procurement, for an independent audit risk assessment to update the FY 2025-26 Audit and develop the FY 2026-27 Audit Plan.

BACKGROUND INFORMATION:

IAD issues written reports following the conclusion of each internal audit engagement and the results are summarized quarterly for the Board and are presented in the Executive Summary of Internal Audit Reports (Attachment A). The report for this quarter covers six audit reports issued from January 1, 2025 to March 31, 2025 (Attachments C through H). The prior Executive Summary for reports issued between October 1, 2024 to December 31, 2024 was approved by the Board on March 25, 2025.

The FY 2025-26 Annual Risk Assessment and Audit Plan (Audit Plan) for Board approval (Attachment B). IAD supports and assists the Board and County management in the realization of their business goals and objectives by testing and reporting on the effectiveness of County internal control systems and efficiency of business processes. IAD is also now responsible for the County's Performance Audit function which involves independent assessments that examine the efficiency and effectiveness of a County program, function or operation. IAD has prepared an Audit Plan that provides a systematic approach for evaluating the effectiveness of internal control and efficiency of key County business operations.

The Audit Plan is a comprehensive plan that details audits to be completed in the upcoming fiscal year. Over 63% of the FY 2025-26 Audit Plan consists of carryover audits from the previous year that IAD did not conduct as planned due to Board directives that far exceeded budgeted reserves for unplanned/special assignments, and unfilled vacancies. These carryover audits limited IAD's capacity to add new audits to the FY 2025-26 Audit Plan and as a result, IAD did not perform its standard Countywide risk assessment this year. However, the Audit Plan incorporates key risk assessment activities, such as soliciting input from key stakeholders. The prior FY 2024-25 Audit Plan was approved by the Board on June 25, 2024. The FY 2025-26 Audit Plan was approved by the Audit Oversight Committee (AOC) on May 15, 2025, with a recommendation from the AOC to direct the IAD to:

- Contract with a reputable CPA firm that is already approved by County procurement to conduct an independent risk assessment by October 31, 2025.
- Use the results of the Contractor's risk assessment to modify the FY 2025-26 Audit Plan to incorporate audits of high-risk areas, and develop the FY 2026-27 Audit Plan.

FINANCIAL IMPACT:

N/A

STAFFING IMPACT:

N/A

ATTACHMENT(S):

Attachment A - Executive Summary of Internal Audit Reports for Quarter Ended March 31, 2025

Attachment B - FY 2025-26 Annual Risk Assessment & Audit Plan

Attachment C - Risk Assessment and Review of All Orange County American Rescue Plan Act Funded Contracts and Expenditures; Audit No. 2425 dated February 5, 2025

Attachment D - Information Technology Audit: Health Care Agency Selected Cybersecurity Controls; Audit No. 2419, dated March 25, 2025

Attachment E - Internal Control Audit: District Attorney-Public Administrator Fiduciary Fund 164; Audit No. 2405, dated March 26, 2025

Attachment F - Internal Control Audit: OC Waste & Recycling Cash Disbursements & Payables; Audit No. 2406, dated March 27, 2025

Attachment G - Information Technology Audit: OC Public Works Selected Cybersecurity Controls; Audit No. 2414, dated March 31, 2025

Attachment H - First Follow-Up Information Technology Audit: OCIT Enterprise IT Governance; Audit No. 2315-F1, dated February 19, 2025



RECEIVED

2025 SEP 19 AM 9:10

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

MEMORANDUM

To: Clerk of the Board

From: Chair Chaffee, District Four Office

Day Chaffee

Date: September 19, 2025

RE: Supplemental Item for September 23rd, 2025, Board of Supervisors Meeting *534C*

Chair Chaffee requests a supplemental item for the September 23rd, 2025, Board of Supervisors meeting be added to:

Approve the sponsorship of the following nonprofit entities from the Fourth District events funds:

- Anaheim Union High School District Foundation - \$100,000
- Placentia Round Table Women's Club - \$1000
- The Cambodian Family Community Center - \$1,750

Recommended Actions:

1. Approve the addition or revisions of events to the FY 2025-2026 County Event Calendar, as set forth in Attachment A, and per Government Code Section 26227, find that the events therein will serve a public purpose of the County of Orange and will meet the social needs of the population of the County, including but not limited to, the areas of health, law enforcement, public safety, rehabilitation, welfare, education, and legal services, and the needs of physically, mentally and financially handicapped persons and aged persons; that County staff and resources may be used in furtherance of such events; and that County staff may solicit donations of funds and services for such events.

2. Authorize Auditor-Controller to make related payments.

County Event Calendar

FY 25-26 Events

[illegible]

Glossary of Acronyms

BOS-1	Board of Supervisors District 1
BOS-2	Board of Supervisors District 2
BOS-3	Board of Supervisors District 3
BOS-4	Board of Supervisors District 4
BOS-5	Board of Supervisors District 5
TBA	To Be Announced
TBD	To Be Determined
N/A	Not Applicable



RECEIVED

2025 SEP 19 AM 10:51

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

MEMORANDUM

To: Chairman Chaffee, Fourth District

Day Chaffee

From: Supervisor Vicente Sarmiento, Second District

Date: September 19, 2025

RE: Items for September 23, 2025, Board of Supervisors Meeting

534D

Please add this as a supplemental item for the September 23, 2025, Board of Supervisors meeting:

Approve the sponsorship of the following nonprofit entities from the Second District events funds:

- JMh - Anaheim Foundation Inc -\$600
- Community Action Partnership of Orange County-\$1,000
- City of Tustin-\$1,500
- The Friendly Center-\$10,000
- Promotores de Salud de OC -\$1,500

Recommended Actions:

1. Approve the addition or revisions of events to the FY 2025-26 County Event Calendar, as set forth in Attachment A, and per Government Code Section 26227, find that the events therein will serve a public purpose of the County of Orange and will meet the social needs of the population of the County, including but not limited to, the areas of health, law enforcement, public safety, rehabilitation, welfare, education, and legal services, and the needs of physically, mentally and financially handicapped persons and aged persons; that County staff and resources may be used in furtherance of such events; and that County staff may solicit donations of funds and services for such events.

2. Authorize Auditor-Controller to make related payments.

County Event Calendar

FY 25-26 Events

[illegible]

Glossary of Acronyms

BOS-1	Board of Supervisors District 1
BOS-2	Board of Supervisors District 2
BOS-3	Board of Supervisors District 3
BOS-4	Board of Supervisors District 4
BOS-5	Board of Supervisors District 5
TBA	To Be Announced
TBD	To Be Determined
N/A	Not Applicable



Board of Supervisors

RECEIVED

SEP 19 AM 11:24

CLERK OF THE BOARD
COUNTY OF ORANGE
Memorandum

Date: 9/19/2025
To: Robin Stieler, Clerk of the Board
From: Chairman Doug Chaffee, Fourth District
Vice Chair Katrina Foley, Fifth District
Re: Supplemental Item for the 9/23/2025 Meeting of the Board of Supervisors

Doug Chaffee
NA for KF

934E

Please place a supplemental item on agenda for the 9/23/2025 meeting of the Board of Supervisors to take a **support** position on S. 1462 – Fix Our Forests Act.

Background: On Wednesday, September 17, 2025 the Office of United States Senator Alex Padilla requested that the County of Orange support S. 1462, the Fix our Forest Act, which is bipartisan legislation authored by U.S. Senator John Curtis (R-Utah) and coauthored by U.S. Senators John Hickenlooper (D-Colorado), Tim Sheehy (R-Montana), and Alex Padilla (D-California). This agenda staff report was developed in consultation with the County Executive Office of Legislative Affairs.

Reason for Supplemental: The authors anticipate the legislation to be scheduled for committee hearing prior to the October 14, 2025 meeting of the Board of Supervisors.

Summary: According to the authors, California, along with the broader American West, has long been prone to wildfires, but prolonged drought and the buildup of dry fuels have increasingly intensified fires and extended fire seasons. Wildfires today are more catastrophic — growing larger, spreading faster, and burning more land than ever before. This increasing trend is seen in California, which averages more than 7,500 wildfires a year.

Not including the recent Los Angeles fires, 6 of the top 10 most destructive fires, 3 of the top 5 deadliest fires, and all the state's 9 largest fires have burned since 2017. The status quo is unsustainable, and addressing the scale of the crisis is essential to keeping California communities safe.

To address these challenges, the *Fix Our Forests Act* would:

- **Establish new and updated programs** to reduce wildfire risks across large, high-priority “firesheds,” with an emphasis on cross-jurisdictional collaboration.
- **Streamline and expand tools for forest health projects** (e.g., stewardship contracting, Good Neighbor Agreements) and provide faster processes for certain hazardous fuels treatments.
- **Create a single interagency program to help communities in the wildland-urban interface** build and retrofit with wildfire-resistant measures, while simplifying and consolidating grant applications.
- **Expand research and demonstration initiatives** — including biochar projects and the Community Wildfire Defense Research Program — to test and deploy cutting-edge wildfire prevention, detection, and mitigation technologies.
- **Strengthen coordination efforts across agencies** through a new Wildfire Intelligence Center which would streamline the federal response and create a whole-of-government approach to combating wildfires.
- **Improve reforestation, seedling supply, and nursery capacity**; establish new programs for white oak restoration; and clarify policies to reduce wildfire-related litigation and expedite forest health treatments.

Legislative Platform: S. 1462 aligns with the Legislative Platform approved by the Orange County Board of Supervisors.

Infrastructure & Environmental Resources-23: Fire Protection: “Support enhanced funding for fire prevention and hazardous fuel removal projects in state responsibility lands and ensure local agencies/landowners have access to these funds. Support funding for local agencies to prepare park lands and facilities for wildfire prevention, mitigation, and extinguishment and to assist local agencies in repairing and restoring fire-damaged property and recreational amenities.” Page 31.

Recommended Action Item:

1. SUPPORT – S.1462 (Curtis) Fix our Forests Act



Board of Supervisors

Memorandum

RECEIVED

2025 SEP 19 AM 11:39

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

To: Chairman Doug Chaffee

From: Supervisor Vicente Sarmiento, 2nd District

Date: September 23, 2025

Re: Add Discussion Item to the September 23, Board of Supervisors Meeting Agenda

Please add the following as a discussion item to the September 23, 2025 Board of Supervisors meeting agenda:

Approval of up to \$25,000 for Orange County Gun Buy Back Program

Summary:

Supervisor Vicente Sarmiento requests Board approval to allocate up to \$25,000 from his District 2 discretionary funds to support the Orange County Gun Buy Back Program. This program represents a proactive, community-based effort to reduce the number of unwanted firearms in circulation, enhance public safety, and prevent unwanted guns from ending up on the street.

Background:

Gun buyback programs have been successfully implemented across the nation as a voluntary and effective method for residents to safely dispose of unwanted firearms. These events not only help reduce the risk of accidental shootings, theft, and unlawful use of guns but also strengthen community trust in public safety efforts. In 2024 Supervisor Sarmiento partnered with Board Chairman Doug Chaffee and local law enforcement agencies to sponsor a Gun Buy Back program collecting hundreds of unwanted firearms that were turned in during the event. For this year's event, the Garden Grove Police Department will act as the lead law enforcement agency.

Purpose of Funding:

The requested allocation will cover program expenses necessary to successfully implement and operate the buyback event. Funding will support, but not be limited to, the following:

- Staffing and logistical support
- Gift cards for participants who turn in firearms
- Production and distribution of community outreach materials
- Firearm testing and safe destruction of collected items
- Program supplies and other related expenses

Recommended Action Items:

1. Approve allocation of up to \$25,000 from Second district Discretionary funds for Orange County Gun Buy Back Program
2. Find under Government Code section 26227 that this expenditure is necessary to meet the social needs of County residents.
3. Authorize and direct the County Executive Officer, or designee, to negotiate and enter into an agreement with Garden Grove Police Department as necessary to effectuate the purposes of this allocation, including, but not limited to, the execution of the agreement with Garden Grove Police Department.
4. Authorize and direct the Auditor-Controller, or designee, to make related payments as necessary to effectuate the purposes of this allocation, including, but not limited to Cal- Card, electronic fund transfers or check payments.



LEON J. PAGE
COUNTY COUNSEL

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2025 SEP 18 PM 2:10

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

OFFICE OF THE COUNTY COUNSEL
COUNTY OF ORANGE

400 West Civic Center Drive, Suite 202
Santa Ana, California 92701
Direct No.: (714) 834-3303
E-Mail: leon.page@coco.ocgov.com

Agenda Item No. SCS- 1
September 23, 2025

M E M O R A N D U M

September 18, 2025

TO: Robin Stieler, Clerk of the Board of Supervisors
FROM: Leon J. Page, County Counsel
SUBJECT: Request for Supplemental Closed Session

I am requesting that a closed session be held on Tuesday, September 23, 2025, for the Board to consider various pre-litigation claims filed by members of the public for losses and damages incurred as a result of the September 2024 Airport Fire, as authorized under Government Code section 54956.9(d)(2).

Accordingly, please prepare the Agenda Item to read:

“CONFERENCE WITH LEGAL COUNSEL –
ANTICIPATED LITIGATION – SIGNIFICANT EXPOSURE TO
LITIGATION pursuant to Government Code section
54956.9(d)(2).
Number of Cases: Multiple.

RECOMMENDED ACTION: Conduct Closed Session.”

Thank you.

LJP:vl

cc: Members of the Board of Supervisors
Michelle Aguirre, CEO



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2025 SEP 18 PM 2:10

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

OFFICE OF THE COUNTY COUNSEL
COUNTY OF ORANGE

400 West Civic Center Drive, Suite 202
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Direct No.: (714) 834-3303

E-Mail: leon.page@coco.ocgov.com

LEON J. PAGE
COUNTY COUNSEL

Agenda Item No. SCS- 2
September 23, 2025

M E M O R A N D U M

September 18, 2025

TO: Robin Stieler, Clerk of the Board of Supervisors
FROM: Leon J. Page, County Counsel
SUBJECT: Request for Supplemental Closed Session

I am requesting a supplemental closed session on Tuesday, September 23, 2025, to discuss with the Board the status of existing litigation, pursuant to Government Code section 54956.9(d)(1).

Accordingly, please prepare the Agenda Item to read:

“CONFERENCE WITH LEGAL COUNSEL --
EXISTING LITIGATION Pursuant to Government Code Section
54956.9(d)(1).
Name of Case: *Jane Doe 1 v. County of Orange*,
Orange County Superior Court Case No. 30-2024-01379816-CU-
PO-NJC.

RECOMMENDED ACTION: Conduct Closed Session.”

Thank you.

LJP:vl

cc: Members of the Board of Supervisors
Michelle Aguirre, CEO



LEON J. PAGE
COUNTY COUNSEL

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2025 SEP 18 PM 2:10

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

OFFICE OF THE COUNTY COUNSEL
COUNTY OF ORANGE

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E-Mail: leon.page@coco.ocgov.com

Agenda Item No. SCS- 3
September 23, 2025

M E M O R A N D U M

September 18, 2025

TO: Robin Stieler, Clerk of the Board of Supervisors
FROM: Leon J. Page, County Counsel
SUBJECT: Request for Supplemental Closed Session

I am requesting a supplemental closed session on Tuesday, September 23, 2025, to discuss with the Board the status of existing litigation, pursuant to Government Code section 54956.9(d)(1).

Accordingly, please prepare the Agenda Item to read:

“CONFERENCE WITH LEGAL COUNSEL --
EXISTING LITIGATION Pursuant to Government Code Section
54956.9(d)(1).
Name of Case: *Jennifer Kearns v. County of Orange*,
Orange County Superior Court Case No. 30-2021-01194060-CU-
OE-WJC.

RECOMMENDED ACTION: Conduct Closed Session.”

Thank you.

LJP:vl

cc: Members of the Board of Supervisors
Michelle Aguirre, CEO



LEON J. PAGE
COUNTY COUNSEL

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2025 SEP 18 PM 2:10

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

OFFICE OF THE COUNTY COUNSEL
COUNTY OF ORANGE

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Agenda Item No. SCS- 4
September 23, 2025

MEMORANDUM

September 18, 2025

TO: Robin Stieler, Clerk of the Board of Supervisors
FROM: Leon J. Page, County Counsel
SUBJECT: Request for Supplemental Closed Session

I am requesting a supplemental closed session on Tuesday, September 23, 2025, to discuss with the Board the status of existing litigation, pursuant to Government Code section 54956.9(d)(1).

Accordingly, please prepare the Agenda Item to read:

“CONFERENCE WITH LEGAL COUNSEL --
EXISTING LITIGATION Pursuant to Government Code Section
54956.9(d)(1).
Name of Case: *Francis Kerrigan, et al. v. County of Orange*,
Orange County Superior Court Case No. 30-2018-00973047-CU-
CR-CJC.

RECOMMENDED ACTION: Conduct Closed Session.”

Thank you.

LJP:vl

cc: Members of the Board of Supervisors
Michelle Aguirre, CEO



LEON J. PAGE
COUNTY COUNSEL

RECEIVED

2025 SEP 18 PM 3:16

CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

OFFICE OF THE COUNTY COUNSEL
COUNTY OF ORANGE

400 West Civic Center, Suite 202

Santa Ana, California 92701

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E-Mail: leon.page@coco.ocgov.com

Agenda Item No. SCS-6
September 23, 2025

M E M O R A N D U M

September 18, 2025

TO: Robin Stieler, Clerk of the Board of Supervisors

FROM: Leon J. Page, County Counsel

SUBJECT: Request for Supplemental Closed Session

I am requesting a supplemental closed session on Tuesday, September 23, 2025, to discuss with the Board the status of existing litigation, pursuant to Government Code section 54956.9(d)(1).

Accordingly, please prepare the Agenda Item to read:

“CONFERENCE WITH LEGAL COUNSEL --
EXISTING LITIGATION Pursuant to Government Code Section
54956.9(d)(1).
Name of Cases: *Mind OC v. County of Orange*, Orange County
Superior Court Case No.: 30-2024-01442012-CU-CO-CJC.

RECOMMENDED ACTION: Conduct Closed Session.”

Thank you.

LJP:vl

cc: Members of the Board of Supervisors
Michelle Aguirre, CEO