

THE PUTNAM COUNTY LEGISLATURE

40 Gleneida Avenue
Carmel, New York 10512
(845) 808-1020 Fax (845) 808-1933

Paul E. Jonke *Chairman*
Amy E. Sayegh *Deputy Chair*
Diane Schonfeld *Clerk*
Robert Firriolo *Counsel*



Nancy Montgomery	Dist. 1
William Gouldman	Dist. 2
Toni E. Addonizio	Dist. 3
Ginny Nacerino	Dist. 4
Greg E. Ellner	Dist. 5
Paul E. Jonke	Dist. 6
Joseph Castellano	Dist. 7
Amy E. Sayegh	Dist. 8
Erin L. Crowley	Dist. 9

AGENDA PERSONNEL COMMITTEE MEETING TO BE HELD IN ROOM 318 PUTNAM COUNTY OFFICE BUILDING CARMEL, NEW YORK 10512

Members: Chairman Jonke, Legislators Castellano & Nacerino

Monday 6:30p.m. March 27, 2023

(The Audit & Administration Mtg. Will Immediately Follow)

- 1. Pledge of Allegiance**
- 2. Roll Call**
- 3. Acceptance/Personnel Committee Meeting Minutes – February 21, 2023**
- 4. Approval/ Reclassification to Fiscal Technician - Office for Senior Resources/ Director of the Office for Senior Resources Michael Cunningham**
- 5. Approval/ Fund Transfer 23T065/ Reclassification – District Attorney’s Office – 2: Senior Office Assistant -Legal Positions/ District Attorney Robert Tendy**
- 6. FYI/ Accident Report**
- 7. FYI/ Incident Report**
- 8. Other Business**
- 9. Adjournment**

Pers. mtg
3/27

Acceptance # 3

**PERSONNEL COMMITTEE MEETING
40 Gleneida Avenue Room #318
Carmel, NY 10512**

Committee Members: Chairman Jonke, Legislators Castellano & Nacerino

Tuesday

February 21, 2023

(Immediately Followed the 6:30p.m. Protective Svcs Mtg.)

The meeting was called to order at 7:01PM by Chairman Jonke who requested Legislator Castellano lead in the Pledge of Allegiance. Upon roll call Legislators Castellano, Nacerino and Chairman Jonke were present.

Item #3 - Acceptance/ Personnel Committee Meeting Minutes – January 30, 2023

Chairman Jonke stated the minutes were accepted as submitted.

Item #4 - Approval/ Fund Transfer - 23T033/ Planning Department - Reclass Position from Planner II to Principal Planner/ Acting Administrator of Planning John Tully

Chairman Jonke stated he spoke with Acting Administrator of Planning Tully and Personnel Director Eldridge regarding this request. He stated this came as a result of a desk audit that was finalized after the 2023 budget process. He stated this reclass became effective January 1, 2023.

Legislator Sayegh questioned how frequently desk audits are conducted.

Chairman Jonke stated Personnel Director Eldridge could provide the details to that question. He stated that typically when an employee has been working out of title the employee and/or the department head could request that the Personnel Department conduct a Desk Audit.

Legislator Montgomery questioned since this employee was in the position of Planner II, and is now a Principal Planner, does that leave the position of Planner II vacant.

Chairman Jonke stated that he understands County Executive Byrne is in the process of hiring a new department head for the Planning Department. He stated once that is done, he believes there will be a process in which the vacancies in the Planning Department will be filled.

Chairman Jonke made a motion to approve Fund Transfer 23T002 -Planning Department - Reclass Position from Planner II to Principal Planner; Seconded by Legislator Nacerino. All in favor.

Item #5 - FYI/ Incident Report – Duly Noted

Item #6 - Other Business- None

Item #19 - Adjournment

There being no further business at 7:05 PM Chairman Jonke made a motion to adjourn; Seconded by Legislator Nacerino. All in favor.

Respectfully submitted by Deputy Clerk Diane Trabulsy.

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AGENDA

PERSONNEL COMMITTEE MEETING

TO BE HELD IN ROOM 318

PUTNAM COUNTY OFFICE BUILDING

CARMEL, NEW YORK 10512

Members: Chairman Jonke, Legislators Castellano & Nacerino

Tuesday

February 21, 2023

(Immediately Following the 6:30p.m. Protective Svcs Mtg)

1. Pledge of Allegiance
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3. Acceptance/Personnel Committee Meeting Minutes – January 30, 2023
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5. FYI/ Incident Report
6. Other Business
7. Adjournment

COUNTY OF PUTNAM
FUND TRANSFER REQUEST

cc: all
Pers 3/27
A+A 3/27
Reso

TO: Commissioner of Finance

FROM: Sheila Barrett, Deputy Commissioner of Finance *AMB*

DEPT: Finance

DATE: March 8, 2023

APPROVE
#4

I hereby request approval for the following transfer of funds:

FROM ACCOUNT#/NAME	TO ACCOUNT #/NAME	AMOUNT	PURPOSE
10677200.51000.10119 Personnel Services Principal Account Clerk	10677200.51000.10145 Personnel Services Fiscal Technician	\$49,785.00	Reclass position to Fiscal Technician <i>(OSR)</i>
10199000.54980 General Contingencies	10677200.51000.10145 Personnel Services Fiscal Technician	\$ 2,508.00	Reclass position to Fiscal Technician
10199000.54980 General Contingencies	10677200.58002 FICA	\$ 192.00	Reclass position to
Total		\$52,485.00	

23T054

SIGNATURES NOT NEEDED – THEY WILL BE AUTHORIZED VIA COMPUTER SYSTEM

2023 Fiscal Impact \$ 2,700
2024 Fiscal Impact \$ 6,934

LEGISLATURE
PUTNAM COUNTY
CARMEL, NY

2023 MAR - 8 PM 1:25

Department Head Signature/Designee

Date

AUTHORIZATION:

Date Commissioner of Finance/Designee: Initiation and \$0-\$5,000.00

Date County Executive/Designee: \$5,000.01 - \$10,000.00

Date Chairperson Audit/Designee: \$0-\$10,000.00

Date Audit & Administration Committee: \$10,000.01 - \$25,000.00

23T054

Kevin M. Byrne
County Executive



*cc: all
Pers*

Michael Cunningham
Director



M · E · M · O · R · A · N · D · U · M

DATE: March 7, 2023
TO: Diane Schonfeld, Clerk to the Legislature
FROM: Michael Cunningham, Director of the Office for Senior Resources *mc/sj*
CC: James Burpoe, Deputy County Executive
William Carlin, Commissioner of Finance
Paul Eldridge, Personnel Officer
RE: Reclassification

The Personnel Department recently conducted a job analysis review of a position in the fiscal unit of our department. The review was initiated in August of 2022 and after all information was considered, including additional details provided by the incumbent in February 2023, the Personnel Department has concluded that the position is properly entitled Fiscal Technician. A budgetary transfer will be provided by the Finance Department under separate cover.

Please refer this request to the Personnel committee for their review.

Thank you for your consideration of this request. I, along with Personnel Officer Paul Eldridge, will be in attendance at the March Personnel Committee meeting to answer any questions.

Thank you.

attachment: Fiscal Technician Job Specification

2023 MAR - 7 PM 4:39
LEGISLATURE
PUTNAM COUNTY
CARMEL, NY

FISCAL TECHNICIAN

DISTINGUISHING FEATURES OF THE CLASS: This is important technical work of a specialized nature requiring a high degree of accuracy. The incumbent is responsible for ensuring accuracy, consistency and organization in all accounting and fiscal functions for a department or agency. The work includes maintenance of accurate financial records, and managing accounts in accordance with yearly budgetary plans. Work also involves establishment and implementation of departmental accounting procedures, in compliance with any instructions that may be received from New York State Audit and Control and the County Finance Department. Work is performed under general supervision, with wide leeway allowed for the exercise of independent judgment in carrying out details of the work. Supervision may be exercised over the work of subordinate staff. Performs related work as required.

TYPICAL WORK ACTIVITIES: (Illustrative only)

Maintains accurate and current financial records on all departmental or agency accounts and budgets, including fixed asset recording;
Designs, implements, evaluates and refines effective accounting procedures and financial reporting systems for the department or agency;
Assists in the preparation of the annual department or agency budget, secures budget estimate data, forecasts and conducts budget studies;
Gathers data and makes recommendations regarding departmental or agency spending patterns and financial needs;
Maintains accurate data and records with regard to departmental operations, as needed;
Researches relevant laws and regulations pertinent to the financial operation of the department or agency, as needed;
Manages the requisition, purchase, receipt and inventory of supplies and equipment, including payments and records processing;
Manages billing, accounts payable and receipts for outside services provided by the department or agency;
Manages billing, accounts payable and receipts relative to grants and reimbursements;
Prepares periodic fiscal, statistical and management reports;
Coordinates and processes departmental or agency payroll information relative to overtime, part-time, encumbrances, annual salary changes, etc.;
Attends training meetings, workshops and seminars as required;
May confer with Federal, State and local accountants and auditors regarding accounting practices and auditors' recommendations;
May oversee and supervise subordinate staff engaged in a variety of financial operations;
Performs a variety of related activities as required.

Typical Work Activities are intended only as illustrations of possible types of work that might be appropriately assigned to an incumbent of this title. Work activities that do not appear above are not excluded as appropriate work assignments, as long as they can be reasonably understood to be within the logical limits of the job.

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL

CHARACTERISTICS: Good knowledge of governmental fiscal accounting and reporting procedures; good knowledge of methods used in keeping financial accounts and records;

FISCAL TECHNICIAN (cont'd)

working knowledge of fiscal terminology; ability to acquire a working knowledge of departmental or agency affairs related to fiscal management; ability to prepare complete and accurate financial reports and statements; ability to lead and direct the work of others; ability to communicate effectively, both orally and in writing; ability to understand and follow oral and written instructions; ability to establish and maintain effective working relationships; good judgment; initiative; resourcefulness; tact and courtesy; integrity.

MINIMUM QUALIFICATIONS: Either

- a) Associates degree or completion of sixty (60) college credits in accounting, business administration, economics, or other related field, and two (2) years experience in business administration, account keeping, or payroll administration; or
- b) Graduation from high school or possession of a comparable diploma and five (5) years experience in business administration, account keeping, or payroll administration; or
- c) An equivalent combination of training and experience as indicated in a), b) and c) above.

PLEASE NOTE: Education beyond the secondary level must be from an institution accredited or recognized by the Board of Regents of the New York State Department of Education as a post secondary, degree-granting institution.

COUNTY OF PUTNAM
FUND TRANSFER REQUEST

cc: all
Per 5/3/21
AVA 3/27

Reso
APPROVE
#5

TO: Commissioner of Finance

FROM: Sheila Barrett, Deputy Commissioner of Finance

SMB

DEPT: Finance

DATE: March 20, 2023

I hereby request approval for the following transfer of funds:

FROM ACCOUNT#/NAME	TO ACCOUNT #/NAME	AMOUNT	PURPOSE
10116500.51000.510121 Personnel Services Typist/Office Assistant	10116500.51000.10131 Personnel Services Senior Office Assistant Legal	\$35,553.00	Reclass position to Sr. Office Asst. Legal Effective 4/1/23
10116500.51000.510120 Personnel Services Senior Office Assistant Legal	10116500.51000.10131 Personnel Services Senior Office Assistant Legal	\$ 3,809.00	Reclass position to Sr. Office Asst. Legal
10116500.51000.10117 Personnel Services Office Assistant Legal	10116500.51000.10132 Personnel Services Senior Office Assistant Legal	\$38,467.00	Reclass position to Sr. Office Asst. Legal Effective 4/1/23
10116500.51000.510120 Personnel Services Senior Office Assistant Legal	10116500.51000.10132 Personnel Services Senior Office Assistant Legal	\$ 2,485.00	Reclass position to Sr. Office Asst. Legal
Total		\$80,314.00	

23T065

SIGNATURES NOT NEEDED – THEY WILL BE AUTHORIZED VIA COMPUTER SYSTEM

2023 Fiscal Impact \$ -0-

2024 Fiscal Impact - unknown

Department Head Signature/Designee

AUTHORIZATION:

Date	Commissioner of Finance/Designee: Initiation and \$0-\$5,000.00
Date	County Executive/Designee: \$5,000.01 - \$10,000.00
Date	Chairperson Audit/Designee: \$0-\$10,000.00
Date	Audit & Administration Committee: \$10,000.01 - \$25,000.00

2023 MAR 21 AM 10:12
LEGISLATURE
PUTNAM COUNTY
CARMEL, NY

23T065

CHIEF ASSISTANT DISTRICT ATTORNEY
Chana Krauss

FIRST ASSISTANT DISTRICT ATTORNEY
Breanne Smith



cc: all
Pels
ATA

ASSISTANT DISTRICT ATTORNEYS

Todd Carpenter
Joseph Charbonneau
Mackenzie Ferguson
Larry Glasser
Melissa Lynch
Kerianne Morrissey

ROBERT V. TENDY
District Attorney

MEMORANDUM

March 20, 2023

TO: Diane Schonfeld, Clerk to the Legislature

FROM: Robert V. Tendy, District Attorney

SUBJECT: Reclassification

The Personnel Department recently conducted a job analysis review of two clerical positions in our department. The review was initiated on January 12, 2023, and after all information was considered, the Personnel Department has concluded that the positions are properly entitled Senior Office Assistant Legal. This change in classification will result in a nominal change in the 2023 staffing budget, which has been reduced since 2020. A budgetary transfer will be provided by the Finance Department under separate cover.

Please refer this request to the Personnel committee for their review.

Thank you for your consideration of this request. I, along with Personnel Officer Paul Eldridge, will be in attendance at the March Personnel Committee meeting to answer any questions.

cc: James Burpoe, Deputy County Executive
William Carlin, Commissioner of Finance
Paul Eldridge, Personnel Officer

attachments:

Senior Office Assistant Legal Job Specification
Reclassification Letters from the Personnel Department

LEGISLATURE
PUTNAM COUNTY
CARMEL, NY

2023 MAR 20 PM 3:59

PAUL ELDRIDGE
Personnel Officer



ADRIENE IASONI
Deputy Personnel
Officer

January 19, 2023

Classification/Reclassification Notice

Robert Tendy
District Attorney

Dear Mr. Tendy,

Our office has completed a review of the below referenced forms and documentation submitted on behalf of Michele Galligan and Carmela Surace for job classification evaluation:

X Job Classification Questionnaire (Form 220) Dated 1/12/23
____ New Position Duties Statement (Form 222) Dated _____
____ Request for Additional Position(s) in an Already Established Classification (Form 222A)

Please be advised that, pursuant to Civil Service Law, Section 22, we have classified this position as Senior Office Assistant (Legal) the Competitive jurisdictional classification. Please see requirements below.

Please Note:

X Competitive Jurisdictional Classification: Permanent appointment from an appropriate eligible list, now or subsequent to an approved provisional appointment, should this position be adopted as a position in your department or agency.

____ Non-Competitive Jurisdictional Classification: Permanent appointment following a review of a current application of any potential appointee should this position be adopted as a position in your department or agency.

____ Labor Jurisdictional Classification: Permanent appointment following a review of a current application of any potential appointee should this position be adopted as a position in your department or agency.

____ Exempt Jurisdictional Classification: Appointment following a review of a current application of any potential appointee should this position be adopted as a position in your department or agency.

If you have any questions or require any clarification, please do not hesitate to contact me.

At this time, Ms. Surace appears on the eligible list for the title of Senior Office Assistant (Legal) and once funding is approved by the legislature, could be appointed to said title. Ms. Galligan does not appear on the current list; however, she can be appointed provisionally until such time as a competitive exam is held. Other appointment options may be available as well, which I am happy to discuss with you.

Sincerely,
Patricia Rau 
Senior Personnel Specialist

CC: Christina Rizzo, Chief of Staff

SENIOR OFFICE ASSISTANT (LEGAL)

DISTINGUISHING FEATURES OF THE CLASS: This is advanced level legal office/clerical and administrative work performed to support the efficient operation of a municipal legal office such as the Law Department, District Attorney's Office or Social Services Attorneys' Office. Familiarity with complex legal terminology used in the preparation of legal briefs and documents is required. Work involves the operation of automated systems equipment in the preparation and storing of legal documents and correspondence. General supervision is provided by legal staff and higher-level administrators. Supervision is not a responsibility of this position. Performs related work as required.

TYPICAL WORK ACTIVITIES: (Illustrative only)

- Prepares and processes legal correspondence and documents relative to New York Criminal Procedure Law (§370.15, §710.30) and other laws and statutes, such as notices, subpoenas, orders, responses, declarations, statements, certificates, affidavits and other legal forms required for federal, state and local courts and related procedures;
- Prepares and provides legal documents and information to Probation Department as requested;
- Receives monthly calendars for assigned local courts and organizes necessary case materials, filing/processing of documents, attorney reminders, etc.
- Receives and maintains case dockets, documents and files relative to all cases on local court calendars for assigned courts;
- Prepares and organizes case files for Assistant District Attorneys' case research and court appearances, which includes running updated criminal histories (Record of Arrests and Prosecutions or RAP sheets) and Department of Motor Vehicles records, evidence and other documentation from arresting agencies such as 911 calls, videos, photos, etc.
- Enters all notes, future court dates, seal orders, warrants, orders of protection, and any other additional information upon case files' return from court, including forfeitures;
- Processes physical and electronic closing/breakdown of cases once they have received dispositions, including proper processing of seal orders;
- Prepares evidence letters on a monthly basis to police agencies relative to disposal of evidence;
- Maintains direct and regular communications with police agencies, jail personnel, laboratories, court clerks, defense attorneys, probation officers, immigration officers, etc. via telephone, fax and email;
- Accesses and monitors relevant confidential information online through, and maintains up-to-date user certification for, browser-based applications including New York State Division of Criminal Justice e-JusticeNY and New York State Department of Motor Vehicles data systems;
- Uses general computer applications such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments;
- Answers and screens telephone calls, greets and directs visitors, takes messages and responds to requests for routine information in accordance with office procedures;
- May open and distribute mail;
- Performs a variety of related activities as required.

Typical Work Activities are intended only as illustrations of possible types of work that might be appropriately assigned to an incumbent of this title. Work activities that do not appear above are not excluded as appropriate work assignments, as long as they can be reasonably understood to be within the logical limits of the job.

SENIOR OFFICE ASSISTANT (LEGAL) (cont'd)

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:

Good knowledge of modern law office methods and procedures, legal forms and legal terminology; good knowledge of executive secretarial skills including correct English usage, grammar, spelling and legal formatting; good knowledge of the capabilities of computer systems equipment and software for legal documents; familiarity with the operations of a public law office; ability to effectively use computer applications such as spreadsheets, word processing, calendar, e-mail and database software; ability to understand and carry out complex oral and written directions; ability to establish and maintain effective working relationships; accuracy; resourcefulness; initiative; tact and courtesy.

MINIMUM QUALIFICATIONS: Either

- a) Associate's degree and two (2) years of office clerical experience, one (1) year of which must have involved the producing and processing of legal correspondence and documents; or
- b) Graduation from high school or possession of a comparable diploma and three (3) years office clerical experience, one (1) year of which must have involved the producing and processing of legal correspondence and documents; or
- c) An equivalent combination of education and experience indicated in (a) and (b) above.

PLEASE NOTE: Education beyond the secondary level must be from an institution accredited or recognized by the Board of Regents of the New York State Department of Education as a post-secondary, degree-granting institution.

Personnel Committee Mtg.
March 27, 2023
#6

FYI/Accident Report

Personnel Committee Mtg.
March 27, 2023
#7

FYI/ Incident Report