

City and County of San Francisco

1649 Accountant Intern Program

Program Manual



Office of the Controller

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Overview

The 1649 Accountant Intern Program (Program) was established to ensure excellent performance in the City and County of San Francisco's (City) Accountant Series. This internship serves as the entry level accountant classification and is endorsed by the International Federation of Professional and Technical Engineers, Local 21, AFL-CIO, the bargaining unit representing the classifications in the Accounting Series. Overall responsibility for the Program resides with the Office of the Controller, by delegation from the Department of Human Resources.

The Program ensures that 1649 Accountant Interns (Interns) are trained properly before they promote to professional-level accounting positions. Interns are trained for eighteen (18) months and are mentored by higher-level, experienced accountants throughout the City. To provide Interns with optimum training and experience citywide, they participate in two nine (9) month rotations, generally at two different departments.

At the end of the Program, successful Interns may be promoted to Permanent Civil Service appointment in classification 1652 Accountant II. For this promotional process, a ranked Civil Service eligibility list is established, using the standard Rule of Three certification. The Departments in which the newly promoted 1652 Accountant IIs are placed is determined by the 1649 Accountant Intern Program Steering Committee (Steering Committee). Interns can only advance to the level of Accountant II by successfully completing the Program.

Steering Committee

Under the direction of the Controller of the City and County of San Francisco, the Steering Committee was formed to oversee the Program. The Steering Committee is comprised of chief fiscal and financial officers from various City departments. The Deputy Controller and Director of the Controller's Office Accounting Operations and Systems division co-chair the Steering Committee. The Controller's Office Director of Finance and Administration is the Program Administrator and a non-voting member of the Steering Committee. The members are:

- **Todd Rydstrom**, Deputy Controller, Office of the Controller, Program Co-Chair
- **Jocelyn Quintos**, Director of Accounting, Office of the Controller, Program Co-Chair
- **Louise Ho**, Financial Reporting Manager, San Francisco International Airport
- **Bruce Robertson**, Finance Manager, Department of Public Works
- **Paula Florence**, Accounting Manager, Office of City Administrator
- **Dora Okai**, Chief Financial Officer, City Attorney's Office
- **Chia Ma**, Deputy Finance Officer, Department of Public Health – Laguna Honda Hospital
- **Crispin Hollings**, Chief Financial Officer, Sheriff Department
- **Jeannie Wong**, Director of Finance & Administration, Office of the Controller
- **Evelyn Bruce**, Financial Reporting and Operating Budget Manager, San Francisco Municipal Transportation Agency
- **Nancy Hom**, Deputy Chief Financial Officer, San Francisco Public Utilities Commission
- **Min Fang**, Policy and Supplier Manager, Office of the Controller



The Steering Committee governs and provides oversight to all aspects of the Program. The Steering Committee develops Program policies and makes determinations on Program issues and/or concerns. Its authority includes the oversight of examinations, selection criteria, curricula and other training needs for the Program. The Steering Committee conducts entrance, mid-Program and final interviews of Interns. They monitor Intern progress, finalize intern evaluations and determine departmental placements. The Steering Committee has the final say on whether an Intern has successfully completed the Program and can graduate.

Program Administration

The Controller's Office Human Resources Unit, under the direction of the Director of Finance and Administration, is responsible for the administration of the Program for the City. The Controller's Office Human Resources Unit also serves as liaison for all candidates, 1649 Accountant Interns, Mentors and Supervisors of the Program. The Human Resources Unit is responsible for a variety of duties, including examination development and administration; recruitment and selection; orientation and Program coordination; monitoring Intern progress; coordinating placement; training; and, evaluation data compilation and coordination. The Human Resources Unit members are:

- Louis Voccia, Room 488, City Hall, (415) 554-7552
- Vicente Centeno, Room 482, City Hall, (415) 554-7506
- Sonali Shaikher, Room 482, City Hall, (415) 554-5246

Departments' requests to participate in the Program and departmental vacancies of 1652 Accountant II positions are reviewed by the Controller's Office Human Resources Unit and the Steering Committee. This review determines the department's ability to provide supervision and mentorship to potential Interns while ensuring accurate classification of vacancies.

Program Entry

Accountant II (1652) vacancies in the City are monitored by the Controller's Office regularly and can be filled by successful 1649 Program graduates. When a new 1649 applicant pool is needed to fill vacancies, the Controller's Office Examination Unit, following standard City procedures, issues a permanent exempt examination announcement.

After the application filing deadline has passed, applications are screened and candidates who demonstrate that they clearly meet the minimum requirements stated in the terms of the announcement are invited to participate in the written examination process. In certain circumstances, provisional employees in higher level accounting classifications may also participate in the examination process for an opportunity to enter the Program.

Once the written examination is administered, tests are scored, and results are evaluated. Candidates receiving a passing score in the written examination are invited to participate in the Oral Interviews/Performance Exercise with the Steering Committee. Using a variety of selection criteria, the Steering Committee determines which candidates will enter the Program.



The selected Interns are appointed as permanent exempt (PEX) employees for the duration of the internship. Because of this type of appointment, unlike permanent Civil Service (PCS) examinations, there is no Civil Service eligibility list for the 1649 Accountant Intern classification.

A goal of the Program is to place every Intern into a permanent 1652 Accountant II position at the end of their final rotation. However, permanent appointments and/or promotions are not automatic or guaranteed and depend on a variety of factors.

Participating Departments' Roles and Responsibilities

City Departments play an important role and are integral in the Intern's and Program's success. As a result, City Departments have several responsibilities:

- Inform the Controller's Office of expected 1649 and/or 1652 vacancies as early as possible.
- Work with the Steering Committee, through Controller's Office Human Resources Unit, to process initial and rotational placements of interns.
- Coordinate time for interns to attend Training Workshops to augment their departmental training experience.
- Foster an environment conducive to learning, where interns can study new concepts and processes and prepare for their final presentation.
- Establish and oversee Intern supervision, training, and performance assessment/appraisal plans in conformance with City and Program standards.
- Work with the Controller's Office to identify performance issues and develop work plans for performance improvement when necessary.
- Participate and respond to requests for information and feedback from the Controller's Office Human Resources Unit.

Departments may also be asked to fund any additional workshops and/or training as determined by the Steering Committee. Departments are invited to provide feedback to the Steering Committee about the Program at any time.

Super Mentors, Mentors, Supervisors, and Leads Roles/Responsibilities

Interns are assigned Mentors and Supervisors during each rotation to guide and train them. Smaller Departments might be assigned a sitting member of the Steering Committee who serves as a Mentor. Mentors and Supervisors play the most important role in the professional development of Accountant Interns, as they are the primary contacts for the Interns and work together closely to provide comprehensive, quality training. The roles and responsibilities of the Super Mentos, Mentors, Supervisors, and Lead Workers are as described below.



Mentor: Someone who will provide overall guidance to the Intern relative to Program goals, criteria, and activities, as well as career development counsel. The Mentor will:

- Provide direction and support with clearly articulated and agreed upon goals.
- Develop processes through which Interns can accomplish and/or modify rotation goals.
- Provide orientation to the Intern on how their Department fits in the overall organizational structure of the City and how their role affects the accounting process in a government agency.
- Serve as a liaison between Interns, Supervisors and the Steering Committee.
- Oversee Intern supervision, training and performance, as well as make recommendations for Program graduation.
- With the assistance of the Supervisors, ensure that all competencies planned for the rotation are met and progress is being monitored or deficiencies addressed appropriately.
- Provide Interns with real-life assignments in which Interns can link accounting principles to practice.
- Be responsible for the progressive and final assessment of the Intern, which should be linked to the goals and measurement standards set at the beginning of the Program.
- Manage the Interns schedule and workload such that they are able to complete their work, attend training workshops, develop their Resource Binders, and prepare for their final presentation.

Supervisor: Someone who provides day-to-day supervision and training to Interns; someone who supports the Intern's development into a well-rounded accountant; someone who actively monitors the Intern's performance regarding the accounting competencies in the Intern Performance Plan.

The Program may be the Intern's first exposure to the workforce or the public sector, so Supervisors have an important role in shaping the future of the Accountant Intern and their perception of the accounting profession. Supervisors implement the goals established by the Program and the Intern Performance Plan. Supervisors are responsible for managing the Interns during each rotation and providing Interns with a quality learning experience achieved through the provision of an environment and supervisory structure conducive to professional growth. They also develop performance plans, identify performance issues and create specific work plans when necessary. They prepare the Intern's draft Training and Experience Evaluations, in conformance with citywide standards.

Super Mentors: Super Mentors are members of the Steering Committee who are assigned to their own departments or smaller departments with no Steering Committee representation. They make final decisions in the best interests of the departments they represent or are assigned to represent, and the 1649 Accountant Interns. An important function of their role is to assess Performance Evaluations. They are the first party to review and sign off on 1649 Performance Evaluations, and can adjust scores, criteria, and justification as needed.



Lead: A working leader that assigns work and ensures completion for a specified work group. While lead workers may assist in many supervisory functions, it will just be in preparing or offering input rather than making determinations/recommendations as done by Supervisors and Mentors. Check the Memorandum of Understanding (MOU) for specific information on lead persons.

Competencies Skills Checklist

Successful completion of the Program will be partially based on the Intern's ability to meet specific competencies and demonstrate specific skills. The Competencies Skills Checklist covers a range of areas and skills that Interns are expected to understand, demonstrate and/or articulate. Interns must achieve a "Proficient" rating in all competencies skills, as listed below, in order to successfully graduate from the Program:

1649 Accountant Intern Program Competencies Skills*

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- I. Encumbrance, Purchasing and Accounts Payable Process
 - II. Revenue Process
 - III. Payroll/Personnel Process
 - IV. Budget Process
 - V. Knowledge of PeopleSoft
 - VI. Financial Analysis and Reports
 - VII. General Ledger
 - VIII. Communication
 - IX. Federal and State Grant Reimbursement Process
 - X. Demonstrated Knowledge of Existing Legal Authorities
 - XI. Demonstrated Ability using Personal Computers; including Microsoft Word and Excel
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*For more information, see Appendices, Competencies Skills Checklist & Intern Performance Plan.

The written Training and Experience Evaluations (see Intern Evaluations and Other Graduation Criteria below) of Interns are based upon the Competencies Skills Checklist and are utilized to evaluate how well an Intern has met each competency and/or what improvement is needed. The evaluation is drafted by the Mentors and Supervisors and finalized by the Steering Committee.

What Comprises a Proficient Rating?

A "Proficient" Rating indicates that the Intern is independently able to complete assigned tasks without difficulties and with a basic understanding of the concepts and guidelines required to fulfill the job. Please see Competencies Skills Checklist Guidelines for additional detail.

Intern Performance Plan

Mentors and Supervisors are required to develop a performance plan based on the Competencies Skills Checklist for each Intern. The plan can also include training and expectations relative to additional topics and/or areas of work specific to that Department. Elements of a successful performance plan include clearly articulated tasks and activities that will help the Intern demonstrate their ability to achieve a "Proficient" rating in any given Competencies Skills area.



Please see the sample Performance Plan. Performance Plans must be submitted to the Controller's Office Human Resources Unit no later than two weeks after the Interns' start date.

Training Workshops

This is a workforce development program. During the 18-month internship, Interns attend various training workshops to build their technical competencies and develop an understanding of the City's purchasing and accounting procedures. In addition to specific accounting systems training, the Interns are also familiarized with various City processes, policies and procedures with emphasis on their relationship to accounting when appropriate.

Training Rotations

Interns are expected to successfully complete two 9-month rotations of on-the-job training, generally in two different Departments. Intern placement for rotations is determined by the Steering Committee. At the beginning of each rotation, Interns meet with their Mentors and Supervisors to discuss their upcoming rotation and complete a Competencies Skills Checklist and Performance Plan.

Rotation 1 Interview

Rotation 1 interviews generally take place approximately nine months after the beginning of the first rotation. The Rotation 1 interviews are comprised of a series of short questions to which the Intern must provide a response. The Competencies Skills Checklist/Performance Plan is reviewed by the Steering Committee and the Intern evaluation is finalized. If the Intern has received, at minimum, a "Proficient" rating in the first rotation, the Steering Committee agrees, and a position is available, the Intern proceeds on to a second rotation to complete the remaining training components.

Pass-Off Between Rotation 1 and Rotation 2 Departments

When the Rotation 1 interviews are completed and placements for the second rotation are finalized by the Steering Committee, Controller's Office Human Resources Unit will notify Interns and their Departments of Rotation 2 assignments.

Rotation 2 Presentation Workshops

In the second rotation of the Program, the Interns will receive a three-day training session (funded by Department at which intern is assigned to) in which they will learn how to create and present effective oral presentations for a variety of audiences. In addition, Interns will learn how to develop an effective written Executive Summary of their presentation. The first session is a comprehensive training on the subject matter. As a "homework" assignment for the second session, the Interns will draft their final presentation. At the second session, the presentations will be given to the class, recorded on a DVD and critiqued as a final preparation for the final delivery to the 1649 Accountant Intern Steering Committee during their Rotation 2 interview. The Interns will be allowed to keep their own DVD copy.



Rotation 2 Interview and Final Presentation

At the beginning of the second rotation, Mentors and Supervisors developed a performance plan for each Intern as described in a previous section, taking into consideration the remaining areas from the Competencies Skills Checklist that need to be covered.

At the end of the second 9-month rotation, Mentors and/or Supervisors prepare a final draft evaluation of the Interns and a Competencies Skills Checklist. Again, Interns must receive, at minimum, a “Proficient” rating from the Steering Committee to be considered for graduation.

The Interns give their final presentation and are interviewed by the Steering Committee to determine their overall accounting and communication competencies. At the end of the final interview, the Interns receive a rating from the Steering Committee representing their overall performance. The ratings are used to determine graduation from the Program and the computation of each graduating Intern’s ranked score for placement on the 1652 Accountant II Eligible List.

Intern Evaluations and Other Graduating Criteria

The Steering Committee meets as necessary to review the progress of Interns and monitor the Program. At the end of each rotation, Interns receive a completed draft Training and Experience Evaluation by their Mentors and/or Supervisor(s) that is reviewed and finalized by the Steering Committee.

Interns are interviewed by the Steering Committee to determine their overall accounting and communication competencies and to collect feedback on the Program. The Steering Committee may meet with the Mentors and/or Supervisors of the Intern from the final rotation to verify the Intern meets all accounting competencies. Copies of all evaluations and training records are reviewed and finalized by the Steering Committee.

Intern Resources

Interns will be provided with a Resource Sheet that will direct them to important information. This information will include general information about the City, Departments, accounting policies and procedures, and other relevant topics.

Working with Mentors and Supervisors, it is the Intern’s responsibility to familiarize themselves with this information and how it applies to their work. Interns are strongly encouraged to create a Resource Binder where they can compile and organize information they receive during the course of their training. Interns are also encouraged to supplement their Resource Binders with other information that they come across during their Internship.

Successful Completion of the Program

Interns receive official notification of successful completion of the Program from the Controller’s Office Human Resources Unit. Copies of this notice are also sent to the



corresponding Departments to which Interns will be permanently assigned. Successful Interns who complete the Program must then submit applications for the 1652 Accountant II Examination. Controller's Office Human Resources Unit administers this examination.

A combination of assessments from the Internship Program, as specified in the 1652 Accountant II examination announcement, may be used to score the Interns for the 1652 Accountant II Eligible list. Using approved criteria, the list is ranked in order of final scores, using the City's standard 700-1000 point scale. This list is posted and adopted following Civil Service Rules. The individuals who are eligible are then certified and permanent placements are made.

Newly appointed 1652 Accountant II employees will be required to serve a full probationary period as specified by the IFPTE Local 21 Memorandum of Understanding (MOU). Departmental Human Resources should check the appropriate paragraph of the MOU to determine the proper probationary period for each individual employee based on prior service.

Time-Off Approval

The general policy is that supervisors and mentors cannot approve vacation or time-off for interns if they are not their employees when the time-off will occur. Supervisors and mentors can only approve time-off for employees who are in their department at the time the vacation will be taken. Thus, a Rotation 1 supervisor or mentor cannot approve a vacation that will be taken in Rotation 2. A Rotation 2 supervisor cannot grant vacation that will be taken by the employee when they are 1652s, as there is no guarantee where an intern will be placed at the end of the Program. Further, time-off is subject to Departmental approval as well. If there is an emergency, please consult with your Department's assigned Super Mentor. For any other questions, contact the Controller's Office HR Unit.

Termination from Program

Generally, Interns serve as permanent exempt employees for the duration of the Internship. There is no Civil Service list for the 1649 classification and Civil Service Rules and procedures do not apply. Interns can be terminated from the Program at any time during the course of the Internship for unsatisfactory performance or for budgetary reasons. The decision to terminate an Intern is made by the Steering Committee and is not subject to the Civil Service Appeal process. Interns that have other permanent positions with the City may be able to return to their former classification. Controller's Office Human Resources will work with Mentors, Supervisors and departmental Human Resources to address these issues if they arise.

