



COUNTY OF SONOMA

575 ADMINISTRATION
DRIVE, ROOM 102A
SANTA ROSA, CA 95403

SUMMARY REPORT

Agenda Date: 7/11/2023

To: Board of Supervisors

Department or Agency Name(s): Human Services

Staff Name and Phone Number: Gerardo Perez 565-8081, Diana Stone 565-5260

Vote Requirement: Majority

Supervisorial District(s): Countywide

Title:

Human Services Department Appointment of Retiree Extra-Help

Recommended Action:

Approve the appointment of Tracy Marcum as an Accountant III Extra-Help, in order to fill a critically needed position within 180 days of her retirement, pursuant to Government Code §7522.56, with an appointment date as early as July 11, 2023.

Executive Summary:

The Human Services Department is requesting the appointment of Tracy Marcum in a retiree extra-help capacity to provide critical assistance to the Administrative Services Division.

Discussion:

Pursuant to the California Public Employee's Pension Reform Act (PEPRA), Government Code §7522.56, an exception can be made to reappoint a retiree as extra-help provided the governing body certifies that the appointment is necessary to fill a critically needed position, in those circumstances where 180 days from the date of retirement has not yet passed. This approval must be in a noticed public meeting and not on a consent calendar. PEPRA includes other requirements in order for a retiree to be eligible for an Extra-Help appointment, such as not having accepted a retirement incentive and not having accepted unemployment arising out of prior public appointment. The individual and the Human Services Department (HSD) have completed the Retiree Extra-Help Compliance Form certifying the appropriateness of this appointment. The compliance form has been reviewed and approved by County Human Resources.

Tracy Marcum, Accountant III, retired on May 2, 2023. Ms. Marcum worked in HSD for over 33 years and held various job classifications within the Finance Unit. She held the Accountant III position in the Administrative Services Division for over 19 years. In this role, she was responsible for submitting the Workforce Innovation and Opportunity Act (WIOA) state claim for funding. She provided financial management for the CalWORKs program, General Assistance program, Housing Support Program and Housing and Disability Advocacy Program, supporting the Employment & Training Division with their fiscal reporting, claiming and accounting needs. We are requesting to bring Ms. Marcum back as Extra Help to assist with critical time-sensitive tasks and provide support with closing the books at fiscal year-end. HSD has consulted with the Human Resources Department, which is supportive of the recommended action.

In accordance with Government Code section 7522.56, HSD is asking the Board to certify as follows:

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- Tracy Marcum’s appointment to Accountant III is necessary to fill a critically needed position within 180 days of her retirement date;
- Tracy Marcum did not accept retirement incentives upon her retirement; and
- Tracy Marcum’s appointment shall not exceed 960 hours per year.
- Per Internal Revenue Code section 401(a) (36), Tracy Marcum meets the requirement of being of normal retirement age.

If the Board of Supervisors approves the foregoing certifications, Ms. Marcum will be hired no earlier than July 11, 2023 as Extra-Help for the Accountant III position.

Strategic Plan:

N/A

Racial Equity:

Was this item identified as an opportunity to apply the Racial Equity Toolkit?

No

Prior Board Actions:

None

FISCAL SUMMARY

Expenditures	FY 23-24 Adopted	FY 24-25 Projected	FY 25-26 Projected
Budgeted Expenses	\$28,100		
Additional Appropriation Requested			
Total Expenditures	\$28,100	\$0	\$0
Funding Sources			
General Fund/WA GF			
State/Federal	\$28,100		
Fees/Other			
Use of Fund Balance			
Contingencies			
Total Sources	\$28,100	\$0	\$0

Narrative Explanation of Fiscal Impacts:

The payroll cost of extra-help staff is part of budgeted expenses for FY 2023-2024. No additional appropriation is requested.

Staffing Impacts:

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Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)

Narrative Explanation of Staffing Impacts (If Required):

This is a Retiree Extra-Help appointment; no permanent allocations are being added or changed.

Attachments:

None

Related Items "On File" with the Clerk of the Board:

None