



Memorandum

TO: Civil Service Commission

FROM: Jennifer Schembri

**SUBJECT: AMENDMENTS TO THE
CLASSIFICATION PLAN**

DATE: January 30, 2020

Section 3.04.520 of the Civil Service Rules states that when the Director of Human Resources revises or amends the City's classification plan, he/she shall file a written copy of each revision with the Commission at or before the next regular meeting of the Commission. The following are revisions to the classification plan that have been made since the last meeting of the Commission.

1. Revision of Class Specifications

- a. Accounting Technician (FT/PT) (1225/1227)
- b. Principal Account Clerk (1223)
- c. Principal Office Specialist (FT/PT) (1116/1121)
- d. Staff Specialist (FT/PT) (1622/1624)
- e. Associate Engineer (FT/PT) (3814/3828)

Jennifer Schembri
Director of the City Manager's Office of Employee Relations
Director of Human Resources

Attachments:

Accounting Technician (FT/PT) Class Specification
Principal Account Clerk Class Specification
Principal Office Specialist (FT/PT) Class Specification
Staff Specialist (FT/PT) Class Specification
Associate Engineer (FT/PT) Class Specification

City of San José
CLASS SPECIFICATION

Title: Staff Specialist FT/PT (1622/1624)

DEPARTMENT	ACCOUNTABLE TO	FLSA STATUS
Varies	Varies	Non-exempt

CLASS SUMMARY

Under general supervision, is responsible for paraprofessional administrative work in various areas of public administration. Conducts research and compiles data for general or departmental use; may analyze data and prepare reports. Responds to inquiries and explains policies and procedures to others; suggests changes in procedure or formulation of new procedures as they relate to departmental needs. Reviews records, identifies discrepancies, and researches information. Coordinates the maintenance of files, including automated recordkeeping systems; develops filing systems and procedures for file use; and ensures that documents can be retrieved. Performs related work as required.

DISTINGUISHING CHARACTERISTICS

This paraprofessional classification within the Administrative job family is responsible for providing support for assigned public administration tasks. An employee in this class performs a variety of administrative assignments related to the execution of administrative detail, and assisting in departmental administrative service areas. An employee may lead the work of clerical staff, but is primarily an individual contributor with a high level of expertise in generalized office administration. Incumbents are expected to work independently and exercise judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

The class differs from the next higher class of Analyst I in that incumbents of the latter class regularly work on tasks that are varied and complex, requiring considerable discretion and independent judgment, and serve as an executor for an assistant department head, deputy, or other administrator or professional for administrative matters affecting departmental operations. This class differs from Principal Office Specialist in that the latter class performs duties of lesser scope and responsibility, works less independently, and acts as lead for clerical staff.

QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

Minimum Qualifications

Education and Experience

Two (2) years of undergraduate course work from an accredited college or university (equivalent to at least 60 semester units or 90 quarter units) AND three (3) years of experience in varied office clerical work. The three (3) years of experience must include one (1) year of experience assembling and verifying data for complex reports, records, or databases OR acting as a lead to clerical staff.

Acceptable Substitution

Additional experience assembling and verifying data for complex reports, records, or databases OR acting as a lead to clerical staff may be substituted for the education requirement on a year-for-year basis.

A bachelor's degree from an accredited college or university may be substituted for the required experience.

Other Qualifications

(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)

City of San José
CLASS SPECIFICATION

Title: Staff Specialist FT/PT (1622/1624)

Basic Competencies

(Needed at entry into the job in order to perform the essential duties.)

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Customer Service – Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- Decision Making – Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Flexibility – Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- Initiative - Exhibits resourceful behaviors toward meeting job objectives; anticipates problems, is proactive, and avoids difficulties by planning ahead; displays willingness to assume extra responsibility and challenges; pursues continuing education opportunities that promotes job performance.
- Problem Solving – Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Reliability - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.
- Supervision - Sets effective long and short-term goals based on a good understanding of management practices; establishes realistic priorities within available resources; provides motivational support; empowers others; assigns decision-making and work functions to others in an appropriate manner to maximize organizational and individual effectiveness.

DUTY NO.	<u>TYPICAL CLASS ESSENTIAL DUTIES:</u> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*

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Title: Staff Specialist FT/PT (1622/1624)

1.	Conducts researches and compiles data for general or departmental use; reviews and coordinates results and provides report information and data to requestor.	Daily/Several Times
2.	Responds to inquiries and explains policies and procedures to others. Suggests changes in procedure or formulation of new procedures as they relate to departmental needs; works with a variety of agencies, other departments and the public to research and communicate information, and may assist in resolving administrative issues.	Daily/Several Times
3.	Responds to routine records/information requests within City guidelines and policies and procedures, provides documents, or refers to higher level staff for requests outside scope of authority, including redaction provisions; maintains a log of information/records released.	Daily/Several Times
4.	Responsible for the maintenance of files, including automated recordkeeping systems; develops filing systems and procedures for file use; maintains automated files; and ensures that documents can be retrieved.	Daily/Several Times
5.	Utilizes a wide variety of computer applications and equipment including, but not limited to, some or all of the following: online computer systems, word processing software, database systems, automated recordkeeping systems, automated tracking programs, spreadsheets, presentation and graphics software.	Daily/Several Times
6.	Provides administrative support for division, including the review and preparation of invoices for approval; development of task orders and purchase orders; preparation of travel requests and reimbursement reports, travel arrangements including flights, lodging, registration; may assist in the preparation of Procurement Card (p-Card) statement reports and employee reimbursements.	Daily/Several Times
7.	Serves as primary responder to phone and email inquiries/complaints; provides information and performs active problem-solving for customers; shares issues with other divisions, management, and partners as appropriate; monitors customer service related activity and conducts periodic reviews.	Daily
8.	May act as a lead or supervisor to clerical personnel in administrative support functions, assigning, scheduling and checking work, providing technical direction, determining priorities, and training staff. As a lead, may sign timecards and may give input to the supervisor regarding hiring, promotion, termination and discipline of employees; drafts and participates in performance appraisals.	Daily
9.	Participates in analyzing the organization, administration, and functions in a department or large program; and revises/develops forms, records, filing systems, and procedures. Creates various templates to standardize documents and minimize process for easy information retrieval of information/records released.	Weekly
10.	Procures supplies and equipment for assigned organizational unit; conducts unit inventory and control; conducts study of space needs and utilization.	Weekly

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Title: Staff Specialist FT/PT (1622/1624)

11.	Participates in preparation of a variety of written materials relative to employee and public information; performs independent research and report preparation; as assigned, may attend meetings or conferences in place of supervisor.	Weekly
12.	Acts as liaison; tasks include drafting the Council and/or Committee Agenda and meeting with the Council and/or Committee Chair to review the Agenda; working with department heads and external partner agencies to schedule presentations; following up on questions raised during Council and/or Committee meetings and posting the meeting minutes.	Weekly
13.	Organizes and arranges special events or activities including planning with appropriate staff, arranging catering, entertainment, decorations, lodging, vehicle reservations, staffing, and related matters.	Weekly
14.	Schedules meetings; reserves rooms; coordinate events and requests for interpreter services; sets-up a variety of equipment used for presentations, webinar or workshops, like a laptop computer, projector and recorder including sound and audio device and slide gears; registers staff for trainings; makes travel arrangements; reviews travel requests in compliance with City procedures.	Weekly
15.	Participates in budget preparation; reviews and analyzes data of operating departments, such as staffing and equipment requests.	Weekly
16.	May assist in the preparation and coordination of RFPs, contracts, grants or other budget related duties.	As Required
17.	Performs other related duties as required.	As Required

*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

PHYSICAL/ENVIRONMENTAL ELEMENTS

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

CLASSIFICATION HISTORY Created 3/80, Rev. 1/84, Rev. 11/97, Staff Specialist Rev. and Ret. 9/01 (formerly Staff Technician), Rev. and consolidation 03/19; Rev. 01/20 s003

City of San José
CLASS SPECIFICATION

Title: Principal Office Specialist FT/PT (1116/1121)

DEPARTMENT	ACCOUNTABLE TO	FLSA STATUS
Varies	Varies	Non-exempt

CLASS SUMMARY

Under direction, performs a variety of office clerical and administrative tasks requiring a high level of expertise in a major administrative program. May act as a lead, assigning, scheduling and checking work, providing technical direction, determining priorities, and training staff. Maintains up-to-date information about the organization's or program's services. Assembles and verifies data and information in complex reports, records and databases. Performs related work as required.

DISTINGUISHING CHARACTERISTICS

The class of Principal Office Specialist is the fourth level in the Office Administration series. This class differs from Senior Office Specialist in that the latter class performs duties of lesser scope and responsibility and works less independently. The Principal Office Specialist may perform as an individual contributor with a high level of expertise in a major administrative program or the lead of a clerical function that includes Senior Office Specialist staff. Incumbents regularly work on tasks that are varied and complex, and rely on experience and judgment to perform work duties.

A dual career path is available for this classification; there is a Staff Specialist responsible for paraprofessional administrative work in various areas of public administration and a Supervisor, Administration who has full supervisory responsibility over lower level staff.

QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

Minimum Qualifications

Education and Experience

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND three (3) years of experience in varied office clerical work.

Acceptable Substitution

A bachelor's degree from an accredited college or university may be substituted for the required experience.

Other Qualifications

(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)

Basic Competencies

(Needed at entry into the job in order to perform the essential duties.)

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills; displays openness to other people's ideas and thoughts.

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CLASS SPECIFICATION

Title: Principal Office Specialist FT/PT (1116/1121)

- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Customer Service – Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- Multi-Tasking – Can handle multiple projects and responsibilities simultaneously; has handled a wide variety of assignments in past and/or current position(s).
- Problem Solving – Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Reliability - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
1.	May act as a lead, assigning, scheduling and checking work, providing technical direction, determining priorities, and training staff. As a lead, may sign timecards and may give input to the supervisor regarding hiring, promotion, termination, and discipline of employees.	Daily/Several Times
2.	Maintains up-to-date information about the organization's or program's services; develops reports on trends from this data; communicates this information to management and customers.	Daily/Several Times
3.	Provides feedback and suggestions to supervisor to assist in developing or improving administrative processes to customers.	Daily/Several Times
4.	Assembles and verifies data and information in complex reports (such as financial or statistical reports and contractual agreements), records and databases; gathers information and data from other sources such as other departments, or outside agencies; independently prepares summaries, tabulations, or reports of data and information. Ensures reports delivered meet stakeholders/requestors needs and specifications.	Daily/Several Times
5.	Processes and reviews documents, including complex documents that may be legal or technical in nature and may have legal implications and deadlines; recommends changes to documents, as appropriate.	Daily/Several Times

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CLASS SPECIFICATION

Title: Principal Office Specialist FT/PT (1116/1121)

DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
6.	Provides customer service duties by telephone or in person requiring a thorough knowledge of the organization and applicable procedures, laws, rules, and regulations. Customers may be employees, the public, or other departments. Refers individuals to the appropriate staff member or department, gives out a variety of information and written materials; helps individuals fill out a variety of forms that may be complex, takes ownership for resolving complaints and questions by investigating and analyzing the issue, researching information and providing feedback to the customer; makes follow-up calls to ensure issues are resolved in a timely manner.	Daily/Several Times
7.	Sets up complex filing and recordkeeping systems and procedures, including retention control procedures and automated recordkeeping systems. May maintain records pertaining to projects that involve the City and other jurisdictions.	Daily/Several Times
8.	Processes transactions/performs data entry into the PeopleSoft system; reviews and processes disciplinary action memos issued by Employee Relations; analyzes and inputs salary/wage increases; reviews and processes promotional and transfer actions; analyzes and audits pre and post payroll reports; interprets HR and Citywide policies and procedures; communicates with administrative level Citywide liaisons; assists with processing New Hires and Separations, position/section changes, and department location changes.	Daily/Several Times
9.	Interfaces with a wide variety of employees, managers, vendors, public agencies, and other outside organizations to obtain administrative services or materials, obtain or report information, conduct surveys or perform other related administrative tasks. May represent the department in completing administrative reports with other jurisdictions.	Daily/Several Times
10.	Independently prepares and drafts basic memorandums, meeting notes and other documents; answers correspondence, prepares summaries of records, minutes, and other documents without destroying the meaning; compares a variety of documents such as purchase orders, receiving clips, and others to check for arithmetical accuracy and general completeness.	Daily/Several Times
11.	Operates and utilizes a variety of standard office equipment, including but not limited to computers, printers, scanners, phones, calculators, fax, software programs, and accounting machines and equipment.	Daily/Several Times
12.	Utilizes a wide variety of computer applications including, but not limited to, some or all of the following: online computer systems, word processing software, database systems, automated recordkeeping systems, automated tracking programs, spreadsheets, presentation and graphics software.	Daily/Several Times
13.	Schedules meetings and appointments for management staff; coordinates meeting room reservation calendars.	Daily
14.	Assists the divisions in preparing for various events such as testing, training, and interviews.	Weekly
15.	May receive cash payments and make change; proves and balances cash receipts.	Intermittent
16.	Performs other related duties as required.	As Required

City of San José
CLASS SPECIFICATION

Title: Principal Office Specialist FT/PT (1116/1121)

*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

PHYSICAL/ENVIRONMENTAL ELEMENTS

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

CLASSIFICATION HISTORY *Created 2/80, Rev. 4/81, Rev. 11/90, Rev. & Ret. 11/96 (formerly Principal Clerk), Rev. 6/97, Rev. & Ret. 9/01 (formerly Supervising Office Specialist), Rev. 08/18; Rev. 01/20 s006*

City of San José
CLASS SPECIFICATION

Title: Principal Account Clerk (1223)

DEPARTMENT	ACCOUNTABLE TO	FLSA STATUS
Varies	Varies	Non-exempt

CLASS SUMMARY

Under direction, performs accounting clerical work including supervision and maintenance of a segment of the City's total financial system. Supervises and participates in central finance control of billing/payment review, verification of documents and/or printouts, batch control for data processing of financial records, contract payments, and other support systems. May be assigned duties as a direct supervisor and/or perform as an independent contributor. Participates in or has responsibility for various ledgers, journals, accounts, records, and similar accounting clerical functions; prepares reports, summaries, and balances. Performs related work as required.

DISTINGUISHING CHARACTERISTICS

This is the most advanced clerical class in the Account Clerk classification series responsible for serving as the consolidation point for a variety of inputs into the assigned financial system area. Incumbents regularly work on tasks that are varied, requiring considerable discretion and independent judgment. Positions in this classification rely on experience and judgment to ensure the efficient and effective functioning of the assigned financial system area. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. Further, Principal Account Clerks usually supervise the work of lower level clerical accounting positions. This class differs from Senior Account Clerk in that incumbents of the latter perform duties of lesser scope and complexity. This class differs from the next higher class of Accounting Technician in that the latter class performs paraprofessional accounting duties, serving as the technical focal position for a major or City-wide financial system.

QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

Minimum Qualifications

Education and Experience

Completion of high school, General Educational Development (GED) Certificate, or California Proficiency Certificate AND three (3) years of accounting clerical experience, including one (1) year in the performance of reviewing and balances ledgers, processing and reviewing revenues, payments, or requisitions, or serving as a timekeeper and processing payroll.

Acceptable Substitution

A bachelor's degree in a related field from an accredited college or university may be substituted for the required experience.

Other Qualifications

(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)

Basic Competencies

(Needed at entry into the job in order to perform the essential duties.)

City of San José
CLASS SPECIFICATION

Title: Principal Account Clerk (1223)

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills; displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Customer Service - Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- Decision Making - Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Flexibility - Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment
- Problem Solving - Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Reliability - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

DUTY NO.	<u>TYPICAL CLASS ESSENTIAL DUTIES:</u> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
1.	Supervises and participates in central finance control of billing/payment review, verification of documents and/or printouts, batch control for data processing of financial records, contract payments, and other support systems.	Daily/Several Times
2.	Participates in or has responsibility for various ledgers, journals, accounts, records, and similar accounting clerical functions; prepares reports, summaries, and balances.	Daily/Several Times
3.	Provides customer service and phone support for payment inquiries both internally and externally. Interacts with the public, other city departments, auditors, other governmental jurisdictions, private banks, insurance companies, collection agency, and various business entities.	Daily/Several Times

City of San José
CLASS SPECIFICATION

Title: Principal Account Clerk (1223)

DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
4.	Prepares organized, legible, and concise written and verbal communication applying directives that are thorough, accurate, and comprehensive.	Daily/Several Times
5.	Operates and utilizes a variety of standard office equipment, including but not limited to computers, printers, scanners, phones, calculators, fax, software programs, and accounting machines and equipment.	Daily/Several Times
6.	Supervises and participates in receipt of and accounting for monies received in payment for City services such as licenses, fees, taxes, assessments, or other charges; supervises and participates in billing for all services and charges and initiates adjustments and refunds.	Daily
7.	May assist in developing/analyzing forms, reports, procedures, controls, and other related functions.	Daily
8.	Identifies problems and recommends solutions for assigned responsibilities.	Weekly
9.	Analyzes, sets up, and creates reports and scripts, and formats computer files.	Weekly
10.	Depending on assignment, may supervise and evaluate the work of subordinate employees or may lead, train, assign, or review work in the absence of a supervisor.	Daily
11.	Performs other related duties as required.	As Required

*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

PHYSICAL/ENVIRONMENTAL ELEMENTS

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

CLASSIFICATION HISTORY Created 5/80, Rev. 7/83, Rev. 2/98, Rev. 08/18; Rev. 01/20 s003

City of San José
CLASS SPECIFICATION

Title: Associate Engineer (FT/PT) (3814/3828)

DEPARTMENT	ACCOUNTABLE TO	FLSA STATUS
Varies	Varies	Exempt

CLASS SUMMARY

Under general direction, supervises and performs the work of staff responsible for providing professional and technical engineering support to the City's infrastructure projects and the civil, structural and life safety review of plans submitted to the City; supervises and participates in the preparation and review of designs, improvement plans, estimates, specifications, and contract documents for engineering related projects and programs. Performs related work as required.

DISTINGUISHING CHARACTERISTICS

The Associate Engineer is the third level of the engineering series. The Associate Engineer is distinguished from the Engineer I/Engineer II in that incumbents of the latter perform professional engineering work and are usually responsible for completing only a segment of an engineering program or project, whereas the Associate Engineer is responsible for supervising professional and technical staff and for performing the more complex project related engineering duties. The Associate Engineer class is distinguished from the Senior Engineer in that the latter class is responsible for management of an engineering section or unit.

QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

Minimum Qualifications

Education and Experience

A Bachelor's degree from an accredited college or university in the required professional engineering discipline or possession of an Engineer-in-Training (EIT) certificate, and three (3) years of increasingly responsible professional engineering experience.

Acceptable Substitution

A Master's degree from an accredited college or university in the required professional engineering discipline may be substituted for one (1) year of professional engineering experience.

Exception

Associate Engineers working in the Building Division as plan reviewers must have four (4) years of progressively responsible experience in professional civil engineering work with at least two (2) years of experience in design and construction of buildings. An EIT certificate is not acceptable as replacement for the required Bachelor's degree.

Required Licensing (such as driver's license, certifications, etc.)

- Certificate of Registration in a relevant professional engineering discipline may be required for some positions.
- Possession of a valid State of California driver's license may be required.
- Other licenses or certifications may be required for particular positions.

Other Qualifications

(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)

Basic Competencies

City of San José
CLASS SPECIFICATION

Title: Associate Engineer (FT/PT) (3814/3828)

(Needed at entry into the job in order to perform the essential duties.)

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills; displays openness to other people's ideas and thoughts.
- Computer Skills - MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Analytical Thinking - Approaches a problem or situation by using a logical, systematic, sequential approach.
- Creativity – Addresses objectives and problems while questioning traditional assumptions/solutions in order to generate creative ideas and new ways of doing business; exhibits creativity and innovation when contributing to organizational and individual objectives; seeks out opportunities to improve, streamline, reinvent work processes.
- Decision Making – Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Planning - Acts to align own unit's goals with the strategic direction of the organization; Defines tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives.
- Problem Solving – Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Project Management - Ensures support for projects and implements agency goals and strategic objectives.
- Supervision: Sets effective long and short-term goals based on good understanding of management practices; establishes realistic priorities within available resources; provides motivational support; empowers others; assigns decision-making and work functions to others in an appropriate manner to maximize organizational and individual effectiveness.

DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
1.	Reviews plans, specifications, calculations, and mapping for compliance with governing laws, codes, ordinances, and regulations within assigned area which includes, but is not limited to, City engineering infrastructure projects and the civil, structural and life	Daily/Several Times

City of San José
CLASS SPECIFICATION

Title: Associate Engineer (FT/PT) (3814/3828)

	safety review of plans submitted to the City; conducts independent engineering analyses and studies on proposed infrastructure and buildings when required to affirm the structural safety of design; prepares technical plan review reports and correspondence to inform concerned stakeholders of findings and decisions; documents project details within specialized databases; may issue permits upon stakeholder compliance with findings and required actions.	
2.	Supervises staff to include: prioritizing and assigning work, conducting performance evaluations, and ensuring staff is trained; makes recommendations on staff hiring, termination, and disciplinary actions.	Daily
3.	Supervises and participates in the preparation and review of designs, improvement plans, estimates, specifications, and contract documents for construction projects or other engineering related projects that are prepared by subordinates and consultants engaged by the City.	Daily
4.	Supervises the collection of field data; analyzes complex engineering data and technical reports; evaluates alternatives to reach sound conclusions and prepares recommendations.	Daily
5.	Manages a diverse range of civil engineering projects and operations in an assigned functional area, which may include, but is not limited to, City infrastructure, and sewer and water systems; projects require coordination with other City departments and divisions, regulatory and other outside agencies, private sector businesses and technical consultants; manages project life cycle including all phases of design, development, testing, and implementation.	Daily
6.	Communicates and advises professional engineers, architects and other stakeholders on the interpretation and application of professional standards and code requirements, in the design, review and analysis of buildings and structures.	Daily
7.	Works closely with other departments to ensure that stakeholders are afforded expedited and integrated services from the City in the review, comment and processing of project plans, specifications and permits.	Daily
8.	Negotiates, prepares and manages consultant agreements; administers the contract; interprets plans and specifications; resolves field problems; performs final inspections, and follows through with acceptance of project.	Daily
9.	Develops and prepares Request For Proposals; assembles plans and specifications, and prepares bidding documents; reviews and evaluates proposals and participates in the selection of consultants and contract awards.	Daily
10.	Represents the City with contractors, consulting firms, and public agencies, and at public meetings concerning City policy on engineering related projects.	Daily
11.	Conducts project field inspections/reviews which include, but are not limited to, overseeing the work of contractors, verifying life safety and fire suppression installation, and investigating property lines, rights-of way, and easements; ensures compliance with project specifications, and approved plans, codes, standards and ordinances;	Daily

City of San José
CLASS SPECIFICATION

Title: Associate Engineer (FT/PT) (3814/3828)

	prepares technical documentation on field inspections/reviews and findings; provides direction and guidance to field inspection staff on project related decisions and operations.	
12.	Performs other related duties as assigned	As Required

*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

PHYSICAL/ENVIRONMENTAL ELEMENTS

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

Possess ability to:

- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Maintain professional demeanor during interactions with staff, customers, and the public.

When assigned to an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Be exposed to moderate noise levels and controlled temperature conditions.

When assigned to field inspection, possess ability to:

- Work in and inspect changing site conditions and work in progress;
- Perform light to medium physical work, including climbing/descending ladders;
- Operate a motor vehicle and visit various City sites;
- Be exposed to unpredictable working conditions including but not limited to loud noise levels, inclement weather conditions, road hazards, vibration, confined workspaces, toxic or caustic chemicals, hazardous physical substances, fumes, odors, gases, dust, and air contaminants;
- Lift, carry, push, and pull materials and objects averaging a weight of 40 pounds, or heavier weights, in all cases with the use of proper equipment.

CLASSIFICATION HISTORY Created 5/84, Rev. 7/84, Rev. & Ret. 9/91, Rev. 12/96, Rev. 6/02, Rev. 10/15, Rev. 04/17, Rev. 09/17; Rev. 01/20 s007

City of San José
CLASS SPECIFICATION

Title: Accounting Technician (FT/PT) (1225/1227)

DEPARTMENT	ACCOUNTABLE TO	FLSA STATUS
Varies	Varies	Non-exempt

CLASS SUMMARY

Under direction, performs complex paraprofessional accounting work on the maintenance of financial records, systems or transactions. Processes financial documents according to internal regulations, and in compliance with city, county, state or federal requirements. Interfaces with other City departments, auditors, business entities, governmental jurisdiction and general public, giving and receiving information regarding area of financial responsibility. May perform the most complex payroll processing work in an assigned department. Performs related work as required.

DISTINGUISHING CHARACTERISTICS

This is the highest level class in the non-professional accounting series responsible for performing paraprofessional accounting work. Incumbents regularly work on tasks that are varied, requiring discretion and independent judgment. Positions in this classification rely on experience and judgment to perform assigned work. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements.

This class differs from the next lower class of Principal Account Clerk based upon the technical difficulty of assigned duties. This class differs from the Accountant I class in that the latter is a professional level class wherein incumbents may prepare and sign off reports, statements and audits and perform other professional accounting functions.

QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

Minimum Qualifications

Education and Experience

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate), AND at least four (4) years performing responsible accounting clerical work, including at least two (2) years of experience reviewing and balancing ledgers, processing and reviewing revenues, payments, or requisitions, or serving as a timekeeper and processing payroll.

Acceptable Substitution

A bachelor's degree in a related field from an accredited college or university may be substituted for the required experience.

Other Qualifications

(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)

Basic Competencies

(Needed at entry into the job in order to perform the essential duties.)

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.

City of San José
CLASS SPECIFICATION

Title: Accounting Technician (FT/PT) (1225/1227)

- **Communication Skills** - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills; displays openness to other people's ideas and thoughts.
- **Computer Skills** - Experienced with financial management system and common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- **Teamwork & Interpersonal Skills** - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- **Customer Service** - Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- **Decision Making** - Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- **Flexibility** - Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- **Problem Solving** - Approaches a situation or problem by defining the problem or issue; determines the significance of problem(s); collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- **Reliability** - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

DUTY NO.	<u>TYPICAL CLASS ESSENTIAL DUTIES:</u> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
1.	Provides detailed technical paraprofessional accounting records to operating departments or Finance Department, including but not limited to: summaries, inventories, control reports, projections or analyses.	Daily/Several Times
2.	Processes financial documents according to internal regulations, and in compliance with county, state or federal requirements; reviews records or other documents to resolve problems and/or determine proper coding, entries and documentation; researches payments received by the City; processes payments and other accounting entries to the Financial Management System (FMS); scans and saves all documents in accordance with policy.	Daily/Several Times
3.	May supervise accounting clerical personnel, assign, and evaluate work.	Daily/Several Times

City of San José
CLASS SPECIFICATION

Title: Accounting Technician (FT/PT) (1225/1227)

DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
4.	Advises operating departments/units in setting up and conducting financial matters and departmental program budgets according to City regulations.	Daily/Several Times
5.	Interfaces with other City departments, auditors, business entities, governmental jurisdiction and general public, giving and receiving information regarding area of financial responsibility.	Daily/Several Times
6.	Operates and utilizes a variety of standard office equipment, including but not limited to computers, printers, scanners, phones, calculators, fax, software programs, and accounting machines and equipment.	Daily/Several Times
7.	Prepares organized, legible, and concise written and verbal communication applying directives that are thorough, accurate and comprehensive.	Daily/Several Times
8.	Within an assigned department, may perform the most complex payroll processing work; ensures shift, premium pay and related compensation or benefits calculations are properly entered and maintained in the payroll system; prepares and submits payroll related reports.	Daily
9.	Maintains financial, real estate, legal documents, and computer records for property and federally funded loans: responsible for loan collections and payoffs.	Weekly
10.	Provides clerical and technical support to other staff within the department or within an assigned functional area.	Weekly
11.	Performs other related duties as required.	As Required

*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

PHYSICAL/ENVIRONMENTAL ELEMENTS

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

CLASSIFICATION HISTORY Created 5/80, Rev. 7/83, Rev. 4/85, Rev. 6/86, Rev. 08/18; Rev. 01/20; s003