

**City of San José**  
**CLASS SPECIFICATION**

**Title: Senior Investigator Collector (1274)**

<b>DEPARTMENT</b>	<b>ACCOUNTABLE TO</b>	<b>FLSA STATUS</b>
Finance	Varies	Exempt

**CLASS SUMMARY**

Supervises the collection and billing of a wide range of City revenues and the enforcing of various codes and ordinances to ensure revenues are maximized and collected in an accurate, timely and equitable manner. Supervises and trains Investigator Collectors and other Revenue Management accounting clerical support staff in auditing municipal tax returns and fee payments of specific businesses and individuals, interpreting, enforcing and proposing changes to municipal revenue-related codes, providing customer service to the general public, City Council, City departments other governmental agencies and revenue associations, researching court cases and testifying in court. Additional duties may include revenue forecasting, reconciling Citywide Accounts Receivable sub-systems to the Financial System General Ledger and evaluating and funding City reserves for doubtful Accounts Receivable. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

This is the highest level class in the three-level Investigator Collector series. This is a supervising position for the Investigator Collector series. This class differs from the Investigator Collector II in that incumbents of the Senior Investigator Collector class are first-line supervisors who plan, assign and evaluate the work of Investigator Collectors, clerical staff and accounting support staff engaged in revenue collection and billing in the field and in the office.

**QUALIFICATIONS**

**Minimum Qualifications**

**Education and Experience**

Bachelor's Degree in Business Administration or a related field and three (3) years of experience comparable to that of an Investigator Collector I or Investigator II with the City of San José including one (1) year of experience acting as a lead.

**Acceptable Substitution**

Experience comparable to the level of Investigator Collector II with the City of San José may be substituted for up to two (2) years of the education requirement on a year for year basis.

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

- Valid California Driver's License (Incumbents may be required to use their personal vehicles in performing the job duties).
- Certified Revenue Officer (CRO)

**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.

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- Knowledge of legal procedures used in investigation and collection.
- In-depth knowledge of municipal taxation principles and collection methods and procedures.
- Analytical Thinking - Approaching a problem or situation by using a logical, systematic, sequential approach.
- 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, MS SharePoint, and MS Excel.
- Fiscal Management – Understands the relationship of the budget and resources to the strategic plan; complies with administrative controls over funds, contracts, and procurements.
- 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.
- 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.
- Teamwork and Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.

**Additional Competencies and/or Desirable Qualifications**

**(Competencies, knowledge, skills and abilities that are more position specific and/or likely to contribute to more successful job performance.)**

**Desirable Qualifications (likely to contribute to more successful job performance; can often be learned on the job):**

- Knowledge of rules and regulations concerning the issuance of citations.
- Knowledge of pertinent City codes and ordinances and ability to interpret them accurately.
- Ability to research legal, financial and other records to obtain data needed to enforce debt collection, recommend refunds or exemptions from payment of taxes.

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DUTY NO.	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (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 the day-to-day operations of the revenue collection work group. Prioritizes and assigns work, conducts performance evaluations, ensures staff are trained; and, makes hiring promotion, termination and disciplinary recommendations, and any other recommendations related to the change in status of employees. Also performs work of a similar nature to those employees being supervised.	Daily
2.	Supervises the audit of financial and operational records of businesses and individuals performed by Investigator Collectors. Review city-wide contracts to ensure timely payments.	As Required
3.	Supervises the collection and review of municipal tax returns performed by Investigator Collectors by assessing any financial hardship, exemption, refund, or closeout recommendations.	Daily
4.	Administers, interprets, and enforces municipal revenue-producing codes by developing appropriate ordinances, amendments and recommendations, to effect changes in revenue codes and by supervising related office and field enforcement activities.	As Required
5.	Approves and records relevant tax data updates into computer systems that track tax-eligible tax revenue collections.	As Required
6.	Improves revenue collection tracking by enhancing the performance of computer systems (strategy formulation for automation, customization of reports, and interface with other systems) and updating legal log books.	As Required
7.	Provides training to other employees and outside entities regarding the use of revenue-tracking computer systems.	Intermittent
8.	Supervises the surveying of commercial mixed-use, annexed, and bare land parcels, in order to ensure accurate billing of various taxes and fees.	As Required
9.	Summarizes financial data from departmental contracts and monitors the contractual obligations and conditions.	As Required
10.	Conducts research and analysis by analyzing work flow studies, revising forms and filing systems, recruiting and examining new employees and consultants, reviewing Request For Proposals (RFPs), etc.	As Required
11.	Assists in communicating to businesses and individuals regarding tax requirements in person, over the phone and in writing; additionally, responds to customer complaints.	Daily
12.	Collects Tax data and develops reports.	As Required
13.	Performs other related work as required.	As Required

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

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

	Climbing		Kneeling		Crawling
	Balancing		Lifting		Reaching
	Stooping	X	Fingering	X	Standing
X	Talking		Grasping	X	Walking
X	Hearing		Feeling		Pushing

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	Crouching				
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Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

**CLASSIFICATION HISTORY** Revised 2/04, Rev. 11/22; s002.