



City of Santa Clara

The Center of What's Possible

CIVIL SERVICE COMMISSION AGENDA

Monday, September 11, 2017 at 7:00 p.m.
City Hall Council Chambers
1500 Warburton Avenue
Santa Clara, CA 95050

I. CALL TO ORDER/PLEDGE OF ALLEGIANCE

II. CONSENT CALENDAR

- A. **MEETING MINUTES** of July 10, 2017.
- B. **CHANGE OF STATUS REPORTS** for July and August 2017.
- C. **CURRENT RECRUITMENT ACTIVITY REPORTS** for July and August 2017.
- D. **EXAMINATION REPORTS** for July and August 2017.

III. ORAL COMMUNICATIONS – The law does not permit Commission Action on, or extended discussion of, any item not on the Agenda except under special circumstances. Note the instructions in the Agenda regarding Oral Communications.

IV. NEW BUSINESS

- A. **CONSIDER REQUEST** to Waive Examination Process for Chief Storekeeper.
- B. **CONSIDER REQUEST** to Abolish the Eligible List for Maintenance Worker I.
- C. **CONSIDER REQUEST** to Abolish the Eligible List for Associate Engineer (Civil).
- D. **CONSIDER REQUEST** to Modify the Examination Weighting for Associate Engineer (Civil).
- E. **CONSIDER REQUEST** to Abolish the Eligible List for Police Records Specialist II.
- F. **CONSIDER REQUEST** to Modify Job Specification for Police Records Specialist II.

- G. **CONSIDER REQUEST** to Adopt Job Specification, Recruitment Type and Examination Weighting for Fire Protection Engineer.
- H. **CONSIDER REQUEST** to Adopt Job Specification, Establish Recruitment Type, and Establish Examination Weighting for Fleet Coordinator.
- I. **CONSIDER REQUEST** to Modify Job Specification for Customer Service Representative.
- J. **CONSIDER REQUEST** to Modify Job Specification for Senior Accounting Technician.
- K. **CONSIDER REQUEST** to Modify Job Specification and Establish Recruitment Type and Examination Weighting for Code Enforcement Officer.
- L. **CONSIDER REQUEST** to Modify Job Specification and Exam Weighting for Account Clerk III.

V. INFORMATIONAL REPORTS

- A. Staff: None
- B. Commissioners: Regarding Meetings or Conferences Attended (if any)

VI. ADJOURNMENT – Adjourn to the next regular meeting of the Civil Service Commission at 7:00 p.m. on November 13, 2017.



City of Santa Clara
Civil Service Commission Minutes
July 10, 2017 at 7:00 PM
City Council Chambers

1500 Warburton Avenue

Santa Clara, CA

Present: Chairperson Mario Bouza, Vice-Chairperson Carolyn McAllister;
Commissioners Willie Brown and John Casey, Human Resources Assistant
Director, Julia Hill, Recording Secretary, Christine Heng.

Absent: Commissioner Pat Staffelbach (excused) and Deputy City Attorney
Diana Fazely.

I. ROUTINE ITEMS

A. CALL TO ORDER/PLEDGE OF ALLEGIANCE

Chairperson Bouza called the meeting to order at 7:00 p.m. and led the
group in the Pledge of Allegiance.

II. CONSENT CALENDAR

**A. MINUTES OF MAY 8, 2017 CIVIL SERVICE COMMISSION
MEETING There being no additions or corrections.**

MOTION by Chairperson Bouza, seconded by Commissioner Brown, to
APPROVE the minutes of the May 8, 2017 Civil Service Commission
meeting.

MOTION carried, 4-0.

B. CHANGE OF STATUS REPORT for May and June, 2017.

C. CURRENT RECRUITMENT ACTIVITY REPORT for May and June, 2017.

D. EXAMINATION REVIEW REPORT for May and June, 2017.

MOTION by Commissioner Casey, seconded by Commissioner Brown, to **NOTE AND FILE** Items II-B, II-C, and II-D.

MOTION carried, 4-0.

III. ORAL COMMUNICATIONS - None

The law does not permit Commission Action on, or extended discussion of, any item not on the Agenda except under special circumstances. Note the instructions in the regarding Oral Communications.

IV. NEW BUSINESS

- A. **CONSIDER REQUEST** to Modify the Exam Weighting for Senior Engineering Aide.

Ms. Hill explained that the Department of Electric Utility will soon conduct a recruitment for the position of Senior Engineering Aide. The Electric Utility Department has submitted a memorandum requesting to change the exam weighting for Senior Engineering Aide from 50% Written and 50% Oral to Qualifying Written and 100% Oral Exam. The written examination is a technical examination evaluating the candidates' technical skills only and will qualify the candidates that should move forward to the oral examination with a passing score. The oral examination includes all Knowledge, Skills and Abilities necessary for this position and will allow the panel to rate on all KSA's for their final score, including the candidate's communication skills and interpersonal skills which is an important requirement for dealing with City employees and the public. There are no recommended changes to the recruitment type (Open/Promotional).

Staff recommended the Civil Service Commission approve the exam weighting change for Senior Engineering Aide to Qualifying Written/100% Oral Examination.

Commissioner Brown inquired of the reason for the change in examination weighting. Ms. Voula Margelos explained that the actual duties of the job have slightly changed due to the change in technology and the existing standardized written exam does not meet the requirement of the change and therefore should not be 50% of the examination process. Additionally, the Senior Engineering Aide classification spans across multiple departments and the hiring supervisors felt that the requested change would better accommodate their departmental needs. Commissioner Brown further asked if the

candidates will take the same oral exam. Ms. Hill and Ms. Margelos confirmed that the oral exams will slightly differ due to different panelists, but the written exam will be standard. Commissioner Brown stated that the written exam evaluates the technical skills and asked what the non-technical skills are. Ms. Margelos explained that the written exam does evaluate technical skills; however, some of those skills have evolved as a result of the change in technology, regulatory legislative changes, and changes in NERC regulation. Commissioner Brown stated that if the written exam is outdated and is not a good predictor, he does not have an issue with eliminating the exam. Ms. Vanessa Guerra, Division HR Manager, clarified that the written examination is not being eliminated and will continue to be part of the testing process to qualify candidates to proceed to the next round of testing, which is the oral examination. The written examination is modified to a pass/fail model, and if a candidate scores high, he/she will move on to the oral examination consisting of interpersonal, oral communication, leadership, and supervisory skill. Chairperson Bouza inquired if the typical job responsibility and licensing requirements still remain; Ms. Guerra stated that the basic requirement of the classification does not change and the recruiters screen to ensure that minimum qualification is met prior to the testing stage. Commissioner Casey asked if a candidate passes the written examination, he/she may be not invited to participate in the oral exam. Ms. Guerra explained that at times, the candidate pool is large and there have been instances where only the top 10-14 candidates proceed forward. The rest of the candidates remain on a conditionally qualified list for 1 year and can be invited to the oral examination at another time. Commissioner Brown asked if the hiring decision is weighted 100% of the oral exam and Ms. Guerra confirmed in the affirmative. Commissioner Brown further inquired about the possibility of a candidate with the lowest the written exam score could be offered the position. Ms. Guerra confirmed that this could indeed happen because of the oral exam being weighted at 100% and the experience and skills are captured during the oral exam.

MOTION by Commissioner Brown, seconded by Vice-chairperson McAllister **to modify the exam weighting for Senior Engineering Aide.**
MOTION carried, 4-0.

B. CONSIDER REQUEST to Modify Job Specification and Exam Weighting for Principal Engineering Aide (Civil).

Ms. Hill stated that the Public Works Department will soon conduct a recruitment for the position of Principal Engineering Aide (Civil). The job specification for Principal Engineering Aide (Civil) was last approved in September 1996. A job analysis was conducted to identify

additions and changes to the job specification. The minimum qualifications section updated the education and experience requirements by revising the degree and classes required. Possible Substitutions were added for the degree and satisfactory completion of the required classes. A Desirable Qualification of experience in AutoCAD was also added. The Typical Duties section was updated to reflect the current tasks this position would perform, such as preparing agreements, maintaining pertinent files, and responding to requests from various internal and external customers. The Knowledge, Skills, and Abilities section was updated to include knowledge in engineering principals and abilities to use computer software used in this line of work. There are no recommended changes to the recruitment type (Open/Promotional). It is recommended to change the current examination weighting from 100% written to 50% written examination and 50% oral examination. This will allow the department to measure a candidate's interpersonal skills and their ability to communicate their education and work experience that would relate to the types of duties performed in the classification.

Staff recommended the Civil Service Commission approve the modified job specification and examination weighting for Principal Engineering Aide (Civil).

Commissioner Casey inquired what the differences between the Senior Engineering Aide and the Principal Engineering Aide (Civil) are. Mr. Ramon Santos, Senior Engineer, explained that the Principal Engineering Aide position is a higher classification and could potentially supervise the Senior Engineering Aide. Commissioner Brown requested for additional information about the "Civil" designation for this classification. Ms. Guerra explained that the City is moving toward a general classification method across departments; however this classification specifically serves the Public Works department. Vice-chairperson McAllister asked if this position is vacant now and Ms. Hill stated "yes" because the incumbent recently retired.

MOTION by Vice-chairperson McAllister, seconded by Commissioner Casey, **to modify job specification and exam weighting for Principal Engineering Aide (Civil).**

MOTION carried, 4-0.

- C. **CONSIDER REQUEST** to Modify Job Specification for Electric and Water System Operator.

Ms. Hill stated that the Department of Electric Utility will soon conduct a recruitment for the position of Electric & Water System Operator. The job specification for Electric & Water System Operator was last revised in May 2012. A job analysis was conducted to identify some minor changes to the job specification. The Education and Experience section was updated to add a recognized State of California Electric System Operator apprentice program to the minimum requirements. A valid Transmission Operator Certificate issued by the North American Electric Reliability Corporation (NERC) was added as a Desirable Qualification. The Knowledge, Skills and Abilities section was updated to better reflect the current position. There are no recommended changes to the recruitment type (Open/Promotional) or the exam weighting (Qual. Written Supplemental/100% Oral).

Staff recommended that the Civil Service Commission approve the modified job specification for Electric & Water System Operator.

Commissioner Casey questioned that the City is recruiting for a classification for both the Electric and Water departments. Ms. Margelos explained that there is control room (operator control), which regulates and manages the traffic flow of the electric and water system within the City. This group is housed at the Electric Utility yard and employees are water and electric operators. Chairperson Bouza asked why the position is vacant and if the recruitment will be promotional or open/competitive. Ms. Margelos advised that the City expects a retirement and that the recruitment type could be open or promotional. Ms. Margelos further stated this position is “career” meaning that individuals in this classification are subject matter experts and would stay in this classification for the entire duration of their career. In addition, Ms. Margelos suggested she is not certain if anyone within the department is qualified for this position. Commissioner Brown asked if the recruiting based for this position will be other municipalities. Ms. Margelos responded that it could be from other municipalities as well as the military. Commissioner Brown further asked if the new added requirements will shrink the applicant pool. Ms. Margelos reported that she does not believe so because these changes would simplify the requirement and it would clearly be specified in the recruitment. Vice Chairperson McAllister emphasized that clearly depicting the requirement would facilitate recruitment and Ms. Margelos agreed. Commissioner Casey asked if the position is a 24/7 shift and if shift differential is provided and Ms. Margelos

confirmed that the position is on a 24/7 shift and shift differential is offered and paid.

MOTION by Commissioner Casey, seconded by Vice-chairperson McAllister, **to modify job specification for Electric and Water System Operator.**

MOTION carried, 4-0.

D. **CONSIDER REQUEST** to Modify Job Specification for Electrical Estimator.

Ms. Hill stated that the Department of Electric Utility will soon conduct a recruitment for the position of Electrical Estimator. The job specification for Electrical Estimator was last revised in September 2007. A job analysis was conducted to identify some changes to the job specification. The Education and Experience section was updated to add one (1) year of Computer Aided Drafting and Design (CADD) programs and satisfactory completion of job specific courses. A Possible Substitution section was added to substitute the education requirement for experience as an estimator, engineering aide or technician on a year for year basis. A Desirable Qualifications section was added to include experience with construction or documenting construction of electric utility facilities and one (1) year of experience with GIS applications. There are no recommended changes to the recruitment type (Open/Competitive) or the exam weighting (100% Oral).

Staff recommended that the Civil Service Commission approve the modified job specification for Electrical Estimator.

Commissioner Casey commented that there seems to be a number of Electric Department requests and was wondering if this is the trend or is something else going on? Ms. Margelos replied that nothing abnormal is occurring, just that the Electric Department has been very busy and after the budget process, a few positions were added. Ms. Margelos reported that additionally, the department has had a number of retirements.

MOTION by Vice-chairperson McAllister, seconded by Commissioner Brown, **to modify job specification for Electrical Estimator.**

MOTION carried, 4-0.

E. **CONSIDER REQUEST** to Modify Job Specification and Recruitment Type for Chief Storekeeper.

Ms. Hill stated that the Finance Department will soon conduct a recruitment for the position of Chief Storekeeper. The job specification for Chief Storekeeper/Buyer was last approved in December 2013. After consideration, the Department would like to separate the classification back to two separate job classifications. A job analysis will be conducted for the Buyer classification at a later date. A job analysis was conducted in May, 2017 to identify additions and changes to the Chief Storekeeper job specification. The desirable qualifications section updated to include acceptable fields of study. The Typical Duties section was changed to reflect current tasks this position would perform, such as use of a mobile device/computer; consult with vendors, contract service providers, purchasing staff, and others regarding products, supply needs, service requirements, and contract terms; and to coordinate and supervise monthly and annual inventory results. The Knowledge, Skills, and Abilities section was updated to include additional mobile device/computer skills, knowledge of safety rules and regulations, and physical requirements relating to inventory control and management. It is recommended that the recruitment type for Chief Storekeeper be changed from (Open/Promotional) to (Closed/Promotional) due to the large internal applicant pool. There are no recommended changes to the examination weighting (100% Oral).

Staff recommended that the Civil Service Commission approve the modified job specification and recruitment type for Chief Storekeeper.

Commissioner Casey emphasized that in the procurement space, professional certification is a requirement of the job, but it is not listed in this job specification. Ms. Belinda Holmes, Purchasing Division Manager, explained that the City's procurement is decentralized and the Chief Storekeeper job is to manage the inventory at the warehouse for the utilities of the Electric and Water and Sewer Departments. Vice-chairperson McAllister inquired what the process for managing the inventory check out is. Ms. Holmes responded that there is requisition process for inventory management. The requisition collects information of the requestor, the item checked out, an account code, etc. Vice-chairperson McAllister further asked if the requisition captures information on the specific job of the individual checking out the item is assigned to. Ms. Holmes indicated that it can be through the account code and project number and item number. Commissioner Casey asked what system the City uses to manage inventory. Ms. Holmes replied the system is Oracle. Commissioner Casey requested to be recused. Commissioner Brown suggested a buyer works with external vendors to purchase materials while a storekeeper would be managing internal inventory and wanted to understand why was it that the positions were

split into two during the budget process. Ms. Holmes shared that during the recession with the budgetary constraints, the positions were combined due to the downturn of the economy and the workload. With the City ramped up and current work load increase, staff is seeking to separate these positions to be more effective and efficient.

Commissioner Brown also asked for further clarification on modifying the recruitment type from open/promotional to closed/promotional. Ms. Holmes explained that this position requires someone with government sector experience and also, the internal pool of candidates would have all the required knowledge and skills for this position. Chairperson Bouza asked how many internal applicants are qualified and Ms. Holmes replied roughly ten (10), from the Finance, Electric and Water and Sewer departments.

MOTION by Commissioner Brown, seconded by Vice-chairperson McAllister, **to modify job specification and recruitment type for Chief Storekeeper.**

MOTION carried, 3-0-1 (Commissioner Casey abstaining).

- F. **CONSIDER REQUEST** for Approval of Change in Job Description Title and Request to Modify Job Specification for Senior Tree Trimmer.

Ms. Hill stated that the Public Works Department will soon conduct a recruitment for the position of Senior Tree Trimmer. The job specification for Senior Tree Trimmer was last approved in October 2001. After reviewing job title for Senior Tree Trimmer, the Human Resources department would like to update and modify the classification title to Tree Trimmer II, as this title will more accurately reflect the job duties. A job analysis was conducted to identify additions and changes to the job specification. Proposed changes to the Minimum Qualifications section include an additional year of experience in tree trimming, removal and insecticide spray procedures. A Desirable Qualifications section was added to include experience in a Lead or Supervisory capacity and possession of Qualified Applicator Certificate (QAC). Proposed additions to the Licenses and/or Certificates section include a Certified Tree Worker status from the International Society of Arboriculture (ISA), California Department of Food and Agriculture Qualified Applicator Certificate (QAC) in categories B, C or F, Certification of completion of Competent Person Fall Protection Training, and a Traffic Flagging and Safety Certificate. The Distinguishing Characteristics section was updated to include planning and coordination of tree maintenance. The typical duties section was updated to include items such as basic/advanced tree climbing techniques, performance of traffic control, and leading the work of a

crew. The Knowledge, Skills and Abilities section was updated to include knowledge of job safety, arboriculture, horticulture, and tree maintenance. The job specification has also been updated to reflect the new standard job description format. There are no recommended changes to the examination weighting (50% Written examination, 50% Performance examination) or the recruitment type (Open/Promotional) for this classification.

Staff recommended that the Civil Service Commission approve the change in job title for Senior Tree Trimmer to Tree Trimmer II. Staff also recommends the Civil Service Commission approved the modified job specification for Tree Trimmer II.

Commissioner Casey commented that the designation of the number II, indicates there would be a III or IV, etc, and asked if is this the case. Ms. Guerra clarified that the job title initially was called a Senior Tree Trimmer with some supervisory responsibility. As the supervisory responsibility was removed from the job description, staff is requesting to change the job title to a Tree Trimmer II. Commissioner Casey also inquired if the City is creating a Tree Trimmer position and Ms. Guerra expressed that the City currently does have a Tree Trimmer classification. Chairperson Bouza asked how many Tree Trimmers the City currently employs. Mr. Dave Staub, Deputy Director of Public Works, stated the City has 2 employees in the Tree Trimmer classification and the City also subcontracts with Arbor Care, True Green, Davey Tree. Chairperson Bouza inquired if the Tree Trimmer II manages the contractors. Mr. Staub responded no, the Tree Trimmers prune trees, take care of dead branches, and other tree maintenance. Vice-chairperson McAllister asked what the response turnaround time is. Mr. Staub explained that the inspection is done within 3 days and based on the priority; response time could be within 24 hours. On the other hand, if requests came in for non-urgent tree trim; this could take up to 6 months. Chairperson Bouza clarified that the Tree Trimmers do not maintain the trees in the parks and Mr. Staub replied in the affirmative and advised that the Parks and Recreation Department maintains the trees in parks. The Public Works Departments maintains the trees on the streets in front of residents as wells as in medians and park strips. A landscape foreman performs the inspections and assigns work to be done by and between the Tree Trimmers and contractors. Chairperson Bouza stated that 2 positions to handle the City's tree maintenance seem slim. Mr. Staub replied that the City used to employ 4 Tree Trimmers and with the economic downturn, positions were cut. Chairperson Bouza also asked if 2 Tree Trimmers could safely perform the task. Mr. Staub responded yes. Commissioner Casey commented

that the City has 2 employees responsible for responding to emergencies. Mr. Staub replied that the Tree Trimmers respond to the emergency calls and coordinate with contractors for larger jobs. In addition, the Streets Department has other Street Maintenance personnel to help with down branches. Commissioner Casey further inquired if a tree is down; will one of the 2 Tree Trimmers respond? Mr. Staub replied not necessarily; an arborist will make the assessment and recommendation. Chairperson Bouza inquired if the recommended changes will cost the City additional money and Mr. Staub replied, no.

Ms. Hill stated the AFSCME union representative, Carlos Gaona, would like to address the job specification. Mr. Gaona stated the union's stance on this job specification change is to have more transparency and job responsibility clarification – specifically how will this position function, what available qualifications can be substituted so that current employees qualify for the position. Union members are concerned that they are not the qualified to apply for Tree Trimmer II position due to the Certified Tree Worker status from the International Society of Arboriculture (ISA) requirement at time of application. The union is requesting that the Commission to table this item to the next Civil Service meeting to allow the union additional time to further discuss the changes and address these concerns with department heads and HR. Vice-chairperson McAllister asked how difficult would it for staff to obtain the certifications listed on the job specification. Mr. Gaona replied that he is unsure of the timeframe required to obtain the certification, which brings him to address another concern with ISA certification requirement, being that a probation period is not provided for employees to get this certification. Vice-chairperson McAllister was curious as to when the union was notified of the proposed changes to the job specification. Ms. Guerra replied that the City has an obligation to notify the union 10 business days prior to the Civil Service Commission meeting, so the notice was sent out June 26, 2017. Commissioner Brown commented that the Commission's role is to review actions; not to ensure proper staffing, nor budgeting, nor direct departments of its' day to day operations. Commissioner Brown also stated that this job description has not been updated since 2001 and there have been substantial changes, such as a recession, economic growth, and drought which resulted in the additions and eliminations of position since 2001; however, he likes the proposed changes to the qualification of this job specification request. Commissioner Brown stated he does not believe there is a reason to delay this request, especially since the most of these qualifications can be obtained within 12 months. Commissioner Casey commented that the union is requesting for transparency, however, the City notified the union within 10 days, but the union representative was on vacation or didn't have a

chance to review the notification. Mr. Gaona confirmed that the union board members were not able to meet; but the union looks at the impact this change will have on its members' growth opportunity. The union's interpretation of this change is that this is not something that would benefit its members who have the field experience, but not the certification. Commission Casey inquired further how the City is not transparent. Mr. Gaona explained that the City could be transparent on how staff acquired information, what cities were surveyed to compare information collected and what standard was utilized. These are some things the union does not fully understand, but would like to work with HR and department heads to better understand this process. Mr. Gaona also shared that the union agree that bringing the City's standard to be in compliance is a good thing. However the requested change will bring forth conflict, being that there is a Senior Tree Trimmer and with a Tree Trimmer II brought in, who will be taking the lead and is the position on a different pay scale. Vice- chairperson McAllister commented that this discussion has digressed from licensing, change in job title and specification and has moved into more labor relation, which the Commission does not have involvement in. Vice-chairperson McAllister stated that if an individual wanted professional growth, he/she would take the initiative to achieve the appropriate licenses and skill required to get in the next position. Vice-chairperson McAllister asked if the AFSCME members have given this some thought. Carol McEwan, AFSCME Business Agent, replied that the members are not aware that there would be a new position available or the requirements of the position. The union's goal is not to delay or slow down or make the process cumbersome. Ms. McEwan stated that it appears that staff took a Tree Trimmer II position and retitled it with new job duties that are higher level than the current job duties. Ms. Guerra explained that with a job description that is 16 years old, HR conducts a review and job analysis and works with the department to ensure that the City has a job title and job description that best meet the needs of the department. With the various changes in 16 years, the position is no longer a senior level, so staff is requesting to retile it to a Tree Trimmer II. The reason is because a senior level has supervisory duty and the Tree Trimmer II will not have supervisory duty and will report to the foreman. Ms. Guerra stated that it appears the main disagreement is in the licensing due at the time of application, not in the job duties, knowledge, skills and abilities which seems to be fine. Chairperson Bouza wished to confirm if both positions will be equal. Mr. Staub responded that the positions are equal and the reason to leveling at the II-level is because the department is looking for someone who is skilled with the proper training and experience. Commissioner Casey inquired if there is a process for which the union can reach out to HR to pull the agenda. Ms. Hill replied that the 10 day notification period is the process. Ms.

Guerra explained that the representative has reached out to her, expressed their concerns; however, this does not prevent the agenda from moving forward to change the job specification. Vice-chairperson McAllister asked how long would it take to for someone to obtain the certification. Ms. Guerra and Mr. Staub indicated they are unsure. Commissioner Brown asked if Commission voted to delay this item, what the union is hoping to achieve. Mr. Gaona stated the Union hopes to get a better understanding of the changes and address the concerns of the members. Commissioner Brown stated that it seems like the Union already had that opportunity. Mr. Gaona further explained that there is also a concern with the job responsibility of a lead and with two people in the same positions, what the organization structure would look like. Commissioner Casey inquired what would be the impact should Commission postpone this item. Mr. Staub explained that there could be delay in response time and certain type of work performed, such as larger jobs. Chairperson Bouza again expressed his concern that the City only has 2 Tree Trimmer positions. Mr. Staub responded that the funding is not at his discretion, so he can only hire based on what was approved. Vice-chairperson asked how many City employees might be interested in this position. Mr. Gaona stated that 40 to 45 employees, from the Streets and Boulevard and Parks divisions, could be impacted. Vice-chairperson stated she is not inclined to delay the decision because winter is approaching and the number of tree dealings would increase. Commissioner Brown also addressed the issue with the lead job duty being desirable, not required. Commissioner Casey inquired if there is a safety issue since two people is required to perform work above 6 feet. Mr. Staub responded the Fall Protection Training is required and if a task is 6 feet above ground, 2 employees are at assigned to the site.

Commissioner Brown motion that the Civil Service Commission approve the change in job description and modify the job specification for Tree Trimmer II. Commission voted 2 ayes- 2 nays. Chairperson Bouza made a motion to postpone this item to September 11, 2017. Commission voted 2 ayes, 2 nays. Vice-chairperson stated that she does not want this to be precedent setting since the City fulfilled its requirement in proceeding within the guidelines and the union had ample time to notify the members and work out the details. Ms. McEwan commented that as a union representative, this is one aspect of a representative's responsibility. However, there are departments, like HR, this is their job function and they do this 8 hours day. However, Mr. Gaona is a Mechanic and he does that all day and his union responsibility is done at his own time and voluntary so it's hard for him to find the time to communicate out. Vice-chairperson McAllister commented she understands the point Ms. McEwan is making and that her comments are not targeted at nor faulting Mr. Gaona. Commissioner

Brown suggested that the Commission consider the City's Charter and the Commission's role and responsibility, which does not include making decision on staffing level. Commissioner Casey inquired how many times has any union come forward to prevent an agenda from proceeding forth. Ms. Guerra stated in the last 11 years she has been employed with the City, it's been under 10 times. Commissioner Casey's view on this is the union's request to "cut them some slack." Vice-chairperson McAllister reiterates that she does not want this to start a precedent where the process was followed and there isn't a reason to make an exception. Commissioner Brown concurred that there is value and reason for process, it holds boundaries and if we break away from the process, then there wouldn't be reason to have these processes. Mr. Gaona indicated that the union would like to retract the request because the bargaining unit's goal is not to be a hindrance, but to work collaboratively with staff.

MOTION by Commissioner Brown, seconded by Vice-chairperson McAllister, **to approve change in job description title and modify job specification for Senior Tree Trimmer.**

MOTION carried, 3-1.

G. CONSIDER REQUEST to Modify Job Specification for Senior Library Assistant.

Ms. Hill stated that the Library Department will soon conduct a recruitment for the position of Senior Library Assistant. The job specification for Senior Library Assistant was last approved in July 1996. A job analysis was conducted to identify additions and changes to the job specification. Proposed changes to the Minimum Qualifications section include customer service experience and one year experience supervising the work of others or as a project leader. The Possible Substitutions section was updated to include a two year Library Technology Associate of Arts degree which may be substituted for one year of the required experience. A proposed change to the License section includes a valid California Class C driver's license at time of appointment and for the duration of employment. The typical duties section was updated to include items such as planning, prioritizing, and reviewing the work of staff, as well as composing and preparing correspondence, memos, reports, and surveys. The Central Library Circulation section was updated to include Customer Service and Youth Services, and proposed additions include performing routine circulation duties and preparing information and marketing materials such as signage, brochures, flyers, and pamphlets. The Extension Services was updated to include Branch Services, and proposed additions include

scheduling and supervising the daily operation of a branch or Mobile Library, driving a bookmobile, and selecting and stocking materials for the bookmobile. The Knowledge, Skills and Abilities section was updated to include items such as knowledge of principles and practices of team building, ability to safely drive a bookmobile, and ability to operate library equipment. The job specification has also been updated to reflect the new standard job description format. There are no recommended changes to the examination weighting (100% Oral examination) or the recruitment type (Open/Promotional) for this classification.

Staff recommended that the Civil Service Commission approve the modified job specification for Senior Library Assistant.

Commissioner Casey questioned that only a Class C driver's license is required to drive a bookmobile. Paul Sims, Assistant City Librarian, explained that the bookmobile is under the 26,000 pounds gross vehicle weight which would require a higher level license. Chairperson Bouza asked if training will be provided to operate the bookmobile and Mr. Sims replied that some training will be provided by the vendor. In addition, the expectation from Staff is the candidate would be comfortable in driving the vehicle safely. Chairperson Bouza also asked that if candidate cannot drive the bookmobile, will he/she automatically be disqualified for the position. Mr. Sims replied yes. Finally, Chairperson Bouza inquired the bookmobile is ADA compliant. Mr. Sims explained that the bookmobile comes with shelves inside of vehicle and services provided will also be exterior based.

MOTION by Vice-chairperson McAllister, seconded by Commissioner Casey, **to modify job specification for Senior Library Assistant.**
MOTION carried, 4-0.

V. UNFINISHED BUSINESS - None

VI. INFORMATIONAL ITEMS

- A. **STAFF REPORTS** - None.
- B. **REPORTS** Regarding Meetings or Conferences Attended (if any).

VII. ADJOURNMENT

MOTION by Chairperson Bouza, **to ADJOURN the meeting at 8:57 p.m., until Monday, September 11, 2017, at 7:00 p.m., the next regularly scheduled meeting of the Civil Service Commission.**

MOTION carried, 4-0

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Julia Hill". The signature is fluid and cursive, with a large initial "J" and "H".

Julia Hill
Assistant Director of Human Resources

**CITY OF SANTA CLARA CHANGE OF STATUS
MONTH OF JULY 2017
June 18, 2017 - July 29, 2017**

ITEM II-B

Department	Position Classification	Type of Appointment	Type of Separation	Effective Date
Community Development				
Watts, Dorothy	Plans Examiner	Probationary		6/27/17
Veach, Jonathan	Hoursing & Community Services Division Manager	Unclassified Appointment		6/30/17
Butler, Frederic	Planning Manager		Resignation	7/28/17
Electric				
Bankston, Charles	Journey Lineworker Apprentice	Probationary		6/19/17
Suriaga, Edward	Sr. Business Analyst		Retirement	6/29/17
Hostettler, Lee	Journey Lineworker Apprentice	Probationary/Promotion		7/2/17
Duncan, Jeffrey	Electric Meter Technician	Probationary		7/3/17
Simpson, Kevin	Journey Lineworker		Resignation	7/13/17
Baker, Richard	Electric Utility Generation Technician	Probationary		7/17/17
Kazlauskas, Robert	Account Clerk III		Retirement	7/24/17
Fire				
Antonelli, Mike	Fire Captain		Retirement	7/3/17
Library				
Takemoto, Laura	Library Assistant II	Probationary		6/19/17
Cote, Amy	Librarian I	Probationary		6/26/17
Parks & Recreation				
Pantel, Howard	Grounds Maintenance Worker I	Probationary		6/26/17
Police				
Wonnell, Michael	Police Officer	Probationary/Promotion		7/2/17
Savage, Scott	Police Officer	Probationary		7/3/17
Wicht, Zachary	Police Officer	Probationary		7/3/17
Edelen, Michael	Police Officer		Resignation	7/14/17
Fernandez, Mario	Recruit Police Officer		Resignation	7/20/17
Cullmer, Justin	Recruit Police Officer	Probationary		7/27/17
Stroud, Melissa	Police Officer		Resignation	7/27/17
Public Works				
Arrighi, Jason	Street Maintenance Worker I	Probationary		6/19/17
Blanchette, Robert	Automotive Technician II	Probationary		7/3/17
Shariat, Carol	Principal Planner	Unclassified Appointment		7/11/17
Ferraris Jr., Armando	Mechanical Maintenance Worker	Probationary/Promotion		7/16/17
Kurotori, Alan	Director of Public Works	Unclassified Promotion		7/16/17

CITY OF SANTA CLARA CHANGE OF STATUS
 MONTH OF JULY 2017
 June 18, 2017 - July 29, 2017

ITEM II-B

Department	Position Classification	Type of Appointment	Type of Separation	Effective Date
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Appointments		Separations	
Probationary	12.00	Resignation	5.00
Probationary/Promotion	3.00	Retirement	3.00
Unclassified Promotion	1.00		
Unclassified Appointment	2.00		
MONTHLY TOTALS	18.00		8.00



 Ingrid Miranda
 Human Resources Management Analyst

Distribution: Original -

- Director of Human Resources
- Civil Service Commission
- Assistant Director of Human Resources
- Building Maintenance Foreperson
- Network Computer Support Division Manager
- Applications Manager - Unisys

**CITY OF SANTA CLARA CHANGE OF STATUS
MONTH OF AUGUST 2017
July 30, 2017 - August 26, 2017**

ITEM II-B

Department	Position Classification	Type of Appointment	Type of Separation	Effective Date
Electric				
Gupta, Shikhar	Electric Utility Program Analyst		Separation	7/31/17
Karwick, Christopher	Electric Division Manager - Generation	Unclassified Appointment		7/31/17
Parks & Recreation				
Boughton, Charles	Grounds Maintenance Worker I	Probationary		7/31/17
Gardea, Armando	Grounds Maintenance Worker I	Probationary		8/7/17
Police				
Robinson, Michael	Community Service Officer I	Probationary		8/7/17
Rocha, Carlos	Community Service Officer I	Probationary		8/14/17
Camarena, Maria	Community Service Officer I	Probationary		8/21/17
Public Works				
Gecaine, Eddie	Mechanical Maintenance Foreperson	Probationary/Promotion		7/30/17
Roque, Joel	Traffic Operations Engineer	Probationary		7/31/17
Water & Sewer				
Chaloux, Morgan	Equipment Operator	Probationary/Promotion		8/13/17
Koeplin, Grant	Assistant Water Superintendent	Probationary/Promotion		7/30/17

Appointments	Separations	
Probationary	6.00	Resignation 1.00
Probationary/Promotion	3.00	
Unclassified Appointment	1.00	
MONTHLY TOTALS	10.00	1.00

Distribution: Original -

- Director of Human Resources
- Civil Service Commission
- Assistant Director of Human Resources
- Building Maintenance Foreperson
- Network Computer Support Division Manager
- Applications Manager - Unisys



Ingrid Miranda
Human Resources Management Analyst

RECRUITMENT ACTIVITY REPORT

July 2017

Item II-C

Req #	Title	Department	Created
16156	Assistant Director of Public Works/City Engineer	Public Works/Engineering	8/23/2016
16171	Staff Aide I	Police	1/25/2017
16197	Police Records Specialist II	Police	11/15/2016
16198	Community Service Officer I	Police	11/15/2016
16210	Troubleshooter	Electric Utility	12/15/2016
16211	Electric Crew Foreperson	Electric Utility	12/15/2016
17004	Park Maintenance & Operations Supervisor	Parks and Recreation	1/6/2017
17005	Park Maintenance and Operations Supervisor	Parks and Recreation	1/6/2017
17006	Business Analyst	Finance	1/9/2017
17014	Office Specialist III	Parks and Recreation	1/20/2017
17015	Principal Engineering Aide - Civil	Public Works/Engineering	3/20/2017
17017	Business Analyst- Public Benefits	Electric Utility	1/24/2017
17024	Electrical Estimator	Electric Utility	2/23/2017
17025	Firefighter I	Fire	2/23/2017
17032	Accounting Technician II	Finance	3/8/2017
17034	Business Analyst	Electric Utility	3/8/2017
17040	Senior Engineering Aide	Electric Utility	3/23/2017
17046	Staff Aide I	City Clerk/City Auditor's Office	4/17/2017
17047	Tree Trimmer II	Public Works/Streets Division	4/24/2017
17050	Senior Library Assistant	Library	5/1/2017
17055	Office Specialist II	City Manager's Office	5/5/2017
17056	Chief Storekeeper	Purchasing	5/8/2017
17058	Crime Analyst	Police	5/16/2017
17060	Electric Helper/Driver	Electric Utility	5/25/2017
17061	Engineering Aide (Electric)	Electric Utility	5/30/2017
17062	Engineering Aide (Electric)	Electric Utility	5/30/2017
17063	Electric and Water System Operator	Electric Utility	6/1/2017
17064	Electric Utility Engineer	Electric Utility	6/2/2017
17065	Assistant Electric Utility Engineer	Electric Utility	6/19/2017
17066	Associate Engineer (Civil)	Public Works/Engineering	6/8/2017
17067	Customer Service Representative	Finance	6/19/2017
17069	Code Enforcement Officer	Public Works/Automotive Services	6/26/2017
17070	Automotive Technician I	Public Works/Automotive Services	6/19/2017
17071	Fleet Assistant	Public Works/Automotive Services	6/26/2017
17074	Senior Materials Handler	Public Works/Automotive Services	6/19/2017
17075	Deputy Fire Marshal II	Fire	6/26/2017
17076	Deputy Fire Marshal I	Fire	6/19/2017
17077	Fire Protection Engineer	Fire	6/26/2017
17080	Staff Analyst I	City Council	6/23/2017
17082	Street Maintenance Worker I	Public Works/Streets Division	6/23/2017
17083	Electric Division Manager - Joint Action Comm	Electric Utility	6/23/2017
17084	Electric Division Manager-Market Analysis and	Electric Utility	6/23/2017
17085	Senior Energy Systems Analyst	Electric Utility	6/23/2017

RECRUITMENT ACTIVITY REPORT

July 2017

Item II-C

Reg #	Title	Department	Created
17086	Associate Engineer (Civil)	Public Works/Engineering	6/26/2017
17087	Electric Utility Electrician	Electric Utility	6/29/2017
17089	Planning Manager	Community Development	6/29/2017
17091	Recruit Police Officer	Police	7/13/2017
17092	Housing Development Officer	Community Development	7/13/2017
17093	Building Maintenance Worker	Building Maintenance	7/14/2017
17095	Firefighter I	Fire	7/18/2017
17096	Accounting Technician I	Finance	7/19/2017
17097	Senior Accounting Technician	Finance	7/19/2017
17098	Public Safety Dispatcher I	Police/Communications Division	7/24/2017
17100	Inspection Manager	Community Development	7/27/2017
17101	Senior Inspector	Community Development	7/27/2017
17102	Combination Inspector	Community Development	7/27/2017
17103	Combination Inspector	Community Development	7/27/2017
17104	Senior Plans Examiner	Community Development	7/27/2017
17105	Plans Examiner	Community Development	7/27/2017
17106	Account Clerk III	Electric Utility	7/27/2017
17108	Mechanical Maintenance Worker	Public Works/Streets Division	7/27/2017
17088	Electric Utility Electrician	Electric Utility	6/29/2017

RECRUITMENT ACTIVITY REPORT

August 2017

Item II-C

Job #	Title	Department	Created
16171	Staff Aide I	Police	1/25/2017
16197	Police Records Specialist II	Police	11/15/2016
16198	Community Service Officer I	Police	11/15/2016
16210	Troubleshooter	Electric Utility	12/15/2016
16211	Electric Crew Foreperson	Electric Utility	12/15/2016
17004	Park Maintenance & Operations Supervisor	Parks and Recreation	1/6/2017
17005	Park Maintenance and Operations Supervisor	Parks and Recreation	1/6/2017
17006	Business Analyst	Finance	1/9/2017
17014	Office Specialist III	Parks and Recreation	1/20/2017
17015	Principal Engineering Aide - Civil	Public Works/Engineering	3/20/2017
17017	Business Analyst- Public Benefits	Electric Utility	1/24/2017
17024	Electrical Estimator	Electric Utility	2/23/2017
17025	Firefighter I	Fire	2/23/2017
17032	Accounting Technician II	Finance	3/8/2017
17034	Business Analyst	Electric Utility	3/8/2017
17040	Senior Engineering Aide	Electric Utility	3/23/2017
17046	Staff Aide I	City Clerk/City Auditor's Office	4/17/2017
17047	Tree Trimmer II	Public Works/Streets Division	4/24/2017
17050	Senior Library Assistant	Library	5/1/2017
17055	Office Specialist II	City Manager's Office	5/5/2017
17056	Chief Storekeeper	Purchasing	5/8/2017
17058	Crime Analyst	Police	5/16/2017
17060	Electric Helper/Driver	Electric Utility	5/25/2017
17061	Engineering Aide (Electric)	Electric Utility	5/30/2017
17062	Engineering Aide (Electric)	Electric Utility	5/30/2017
17063	Electric and Water System Operator	Electric Utility	6/1/2017
17064	Electric Utility Engineer	Electric Utility	6/2/2017
17065	Assistant Electric Utility Engineer	Electric Utility	6/19/2017
17066	Associate Engineer (Civil)	Public Works/Engineering	6/8/2017
17067	Customer Service Representative	Finance	6/19/2017
17069	Code Enforcement Officer	Public Works/Automotive Services	6/26/2017
17070	Automotive Technician I	Public Works/Automotive Services	6/19/2017
17071	Fleet Assistant	Public Works/Automotive Services	6/26/2017
17074	Senior Materials Handler	Public Works/Automotive Services	6/19/2017
17075	Deputy Fire Marshal II	Fire	6/26/2017
17076	Deputy Fire Marshal I	Fire	6/19/2017
17077	Fire Protection Engineer	Fire	6/26/2017
17080	Staff Analyst I	City Council	6/23/2017
17082	Street Maintenance Worker I	Public Works/Streets Division	6/23/2017
17083	Electric Division Manager - Joint Action Comm	Electric Utility	6/23/2017
17084	Electric Division Manager-Market Analysis and	Electric Utility	6/23/2017
17085	Senior Energy Systems Analyst	Electric Utility	6/23/2017
17086	Associate Engineer (Civil)	Public Works/Engineering	6/26/2017

RECRUITMENT ACTIVITY REPORT

August 2017

Item II-C

17087	Electric Utility Electrician	Electric Utility	6/29/2017
17089	Planning Manager	Community Development	6/29/2017
17091	Recruit Police Officer	Police	7/13/2017
17092	Housing Development Officer	Community Development	7/13/2017
17093	Building Maintenance Worker	Building Maintenance	7/14/2017
17095	Firefighter I	Fire	7/18/2017
17096	Accounting Technician I	Finance	7/19/2017
17097	Senior Accounting Technician	Finance	7/19/2017
17098	Public Safety Dispatcher I	Police/Communications Division	7/24/2017
17100	Inspection Manager	Community Development	7/27/2017
17101	Senior Inspector	Community Development	7/27/2017
17102	Combination Inspector	Community Development	7/27/2017
17103	Combination Inspector	Community Development	7/27/2017
17104	Senior Plans Examiner	Community Development	7/27/2017
17105	Plans Examiner	Community Development	7/27/2017
17106	Account Clerk III	Electric Utility	7/27/2017
17108	Mechanical Maintenance Worker	Public Works/Streets Division	7/27/2017
17109	Community Service Officer I	Police	8/2/2017
17110	Electric Utility Programmer Analyst	Electric Utility	8/2/2017
17111	Fire Application Data Analyst	Fire	8/4/2017
17112	Utility Field Services Supervisor	Finance	8/4/2017
17113	Recreation Coordinator	Parks and Recreation	8/11/2017
17114	Recreation Specialist	Parks and Recreation	8/11/2017
17116	Firefighter I	Parks and Recreation	8/14/2017
17117	Utility Crew Supervisor	Water and Sewer Utilities	8/17/2017
17118	Water Service Technician I	Water and Sewer Utilities	8/18/2017
17123	Water & Sewer Maintenance Worker I	Water and Sewer Utilities	8/18/2017
17124	Public Safety Dispatcher I	Police/Communications Division	8/23/2017
17125	Police Lieutenant	Police	8/23/2017
17088	Electric Utility Electrician	Electric Utility	6/29/2017



Date: September 11, 2017

To: Civil Service Commission

From: Christine Heng, Human Resources Technician

Subject: Exam Review Report for July and August, 2017

In the month of July, Commissioner Carolyn McAllister reviewed the written examination for Crime Analyst and the oral examination for Business Analyst. In the month of August, Commissioner Mario Bouza reviewed the written examination for Assistant Electric Utility Engineer and Deputy Fire Marshal I; and the oral examination for Engineering Aide, Senior Library Assistant, Crime Analyst and Assistant Electric Utility Engineer.

In the above cases, the examinations were found to be job-related and appropriate.

A handwritten signature in black ink, appearing to be "Christine Heng".

Christine Heng
Human Resources Technician

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Waive Examination Process for Chief Storekeeper

SUMMARY: This is a request from the Finance Department seeking approval to waive the examination process for Chief Storekeeper, which was a Closed/Promotional recruitment with examination weighting of 100% oral examination.

The recent recruitment for Chief Storekeeper resulted in two qualified candidates. Waiving the oral examination will significantly reduce the amount of time and expense to fill the position. Furthermore, a waiver will allow the department to interview the candidates and determine if they possess the knowledge, skills, and abilities necessary to successfully perform the duties of the position.

RECOMMENDATION: Staff recommends the Civil Service Commission approve the request to waive the current examination process for Chief Storekeeper.

PREPARED BY:




Corey Wilkins-Lee
HR Technician

APPROVED FOR CONTENT:



Julia Hill
Assistant Director of HR

APPROVED:



Elizabeth C. Brown
Director of Human Resources

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Abolish the Eligible List for Maintenance Worker I

SUMMARY: The current eligible list for Maintenance Worker I was established on March 31, 2017 and is scheduled to expire one year later on March 31, 2018. Attached are memoranda from the Deputy Director of Public Works and Deputy Parks and Recreation Director requesting to abolish the eligible list for Maintenance Worker I.

The eligible list for Maintenance Worker I was originally comprised of seventeen (17) candidates. All of the eligible candidates have been interviewed or were waived being interviewed in the Department interview process. Eight (8) hires have been made, leaving eight (8) qualified candidates on the eligible list. The Public Works Department and Parks and Recreation Department have determined through departmental interviews the candidates remaining on the eligible list are not appropriate matches for the current vacancies. Abolishing the eligible list will give an opportunity for other qualified candidates to apply, giving the City the opportunity to select from a more current applicant pool.


No recommendations are proposed for the job specification, the examination weight weighing of 100% Performance Examination, or the recruitment type of Open/Competitive.

RECOMMENDATION: Staff recommends the Civil Service Commission approve the request to abolish the eligible list for Maintenance Worker I.

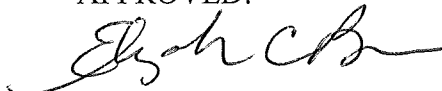
PREPARED BY:


Christine Doan
HR Technician

APPROVED FOR CONTENT:


Julia Hill
Human Resources Assistant Director

APPROVED:


Elizabeth C. Brown
Director of Human Resources



**City of
Santa Clara**
The Center of What's Possible

Parks & Recreation
Memorandum

Date: August 4, 2017
To: Liz Brown, Director of Human Resources
From: Deputy Parks & Recreation Director
Subject: Request to Abolish the Eligible List for Grounds Maintenance Worker I

The Parks & Recreation Department would like to abolish the current Eligible List for Maintenance Worker I. The Department selected and hired five (5) candidates from the original Eligible List.

All highly qualified candidates have already been selected from the current list. The Department appreciates the effort made by the Human Resources Department to effectively generate an excellent list to meet our needs.

A handwritten signature in black ink, appearing to read "Dale Seale".

Dale Seale
Deputy Parks & Recreation Director

cc: Christine Doan, Human Resources



Date: August 4, 2017
To: Liz Brown, Director of Human Resources
From: Deputy Director of Public Works
Subject: Request to Abolish the Eligible List for Maintenance Worker I

The Public Works Department would like to abolish the current Eligible List for Maintenance Worker I. Interviews were conducted on July 27th for a Street Maintenance Worker I vacancy. The Public Works Department chose not to select any of the candidates on the Eligible List for the position.

The Public Works Department has hired three (3) Maintenance Worker I employees off the original Maintenance Worker I Eligible List and the Parks Department has hired several as well. In all, about half of the candidates on the original list were selected for employment.

Thank you to the Human Resources Department staff who worked diligently to put together a great recruitment. Please contact me at (408) 615-3086 if you have any questions.

A handwritten signature in black ink, appearing to read "Dave Staub".

Dave Staub
Deputy Director of Public Works

cc: Christine Doan, Human Resources

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Abolish the Eligible List for Associate Engineer (Civil)

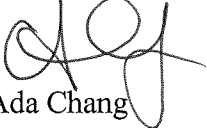
SUMMARY: The current eligible list for Associate Engineer (Civil) was established on December 20, 2016 and is scheduled to expire one year later on December 20, 2017. Attached is a memorandum from the Public Works Department requesting to abolish the eligible list for Associate Engineer (Civil).

The eligible list for Associate Engineer (Civil) was originally comprised of eight (8) candidates. All of the eligible candidates were contacted to participate in the Department interview. Two (2) hires have been made and one candidate withdrew from the process, leaving five (5) candidates on the eligible list. The Public Works Department has determined through departmental interviews that the candidates remaining on the eligible list are not a fit for the current vacancies. Abolishing the eligible list will give an opportunity for other qualified candidates to apply, giving the City the opportunity to select from a more current applicant pool.

No recommendations are proposed for the job specification or the recruitment type of Open/Competitive.

RECOMMENDATION: Staff recommends the Civil Service Commission approve the request to abolish the eligible list for Associate Engineer (Civil).


PREPARED BY:


Ada Chang
Management Analyst

APPROVED FOR CONTENT:


Julia Hill
Assistant Director of HR

APPROVED:


Elizabeth C. Brown
Director of Human Resources



**City of
Santa Clara**
The Center of What's Possible

RECEIVED
AUG 22 2017
HUMAN RESOURCES DEPARTMENT
CITY OF SANTA CLARA

Public Works/Engineering
Memorandum

Date: August 22, 2017

To: Director of Human Resources

From: Director of Public Works

Subject: Abolish Existing Associate Engineer Eligibility List

The Public Works Department would like to request that the current eligibility list for Associate Engineer be abolished. The previous recruitment resulted in hiring two (2) candidates from the list and an unsuccessful department interview for another vacancy. Furthermore, by abolishing the list we will give an opportunity for other qualified candidates to apply, giving the City the opportunity to select from a more current applicant pool.

A handwritten signature in black ink, appearing to read "Alan Kurotori".

Alan Kurotori
Director of Public Works

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017
TO: Civil Service Commission
FROM: Director of Human Resources
SUBJECT: Request to Modify the Exam Weighting for Associate Engineer (Civil)

SUMMARY: The Public Works Department will soon conduct a recruitment for the position of Associate Engineer (Civil).

The Public Works Department has submitted a memorandum requesting to change the exam weighting for Associate Engineer (Civil) from 50% Written and 50% Oral to 100% Oral Exam with a qualifying written examination. The Associate Engineer (Civil) classification requires candidates to have an Engineer in Training (E.I.T) certificate or Registration as a Civil Engineer in the State of California at the time of appointment. These are technically intensive eight hour examinations that would show a candidate's technical ability through a written exam. The oral examination includes all Knowledge, Skills and Abilities necessary for this position and will allow the panel to rate on all KSA's for their final score, including the candidate's communication skills and interpersonal skills which are important requirements for dealing with City employees and the public.

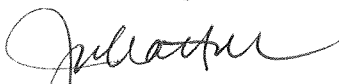
RECOMMENDATION: Staff recommends the Civil Service Commission approve the exam weighting change for Associate Engineer (Civil) to 100% Oral Examination with a qualifying Written Examination.

PREPARED BY:



Ada Chang
Management Analyst

APPROVED FOR CONTENT:



Julia Hill
HR Assistant Director

APPROVED:



Elizabeth C. Brown
Director of Human Resources



**City of
Santa Clara**
The Center of What's Possible

RECEIVED
AUG 22 2017
HUMAN RESOURCES DEPARTMENT
CITY OF SANTA CLARA
Public Works/Engineering
Memorandum

Date: August 21, 2017

To: Director of Human Resources

From: Director of Public Works

Subject: Request to Approve Revised Examination Weighting for Associate Engineer

We are requesting approval to revise the examination weighting for Associate Engineer from 50% written, 50% oral exam to 100% oral with a qualifying written examination. Since this position requires possession of a State of California Engineer in Training (CEIT) certification, which is a written examination and takes care of technical abilities, the current requirement of the written exam is superfluous and delays the recruitment process.

A handwritten signature in black ink, appearing to read "Alan Kurotori".

Alan Kurotori
Director of Public Works

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Abolish the Eligible List for Police Records Specialist II

SUMMARY: The current eligible list for Police Records Specialist II was established on May 11, 2017 and is scheduled to expire one year later on May 11, 2018. Attached is a memorandum from the Chief of Police requesting to abolish the eligible list for Police Records Specialist II.

The eligible list for Police Records Specialist II was originally comprised of eleven (11) candidates. All of the eligible candidates were contacted to participate in the Department interview and background process. One (1) hire has been made and four (4) candidates were disqualified during the background process, leaving six (6) qualified candidates on the eligible list. The Police Department has determined through departmental interviews and/or the background process the candidates remaining on the eligible list are not appropriate matches for the current vacancies. Abolishing the eligible list will give an opportunity for other qualified candidates to apply, giving the City the opportunity to select from a more current applicant pool.

No recommendations are proposed for the job specification, the examination weight of Qualifying Written Examination and Performance Examination with 100% Oral Examination, or the recruitment type of Open/Promotional.

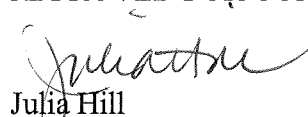
RECOMMENDATION: Staff recommends the Civil Service Commission approve the request to abolish the eligible list for Police Records Specialist II.

PREPARED BY:



Ada Chang
Management Analyst

APPROVED FOR CONTENT:



Julia Hill
Assistant Director of HR

APPROVED:



Elizabeth C. Brown
Director of Human Resources

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Modify Job Specification for Police Records Specialist II


SUMMARY: The Police Department is anticipating an opening for the position of Police Records Specialist II. The job specification for Police Records Specialist II was last approved in March 2006.

The Police Department reviewed and identified changes to the job specification. The Typical Duties section was changed to update the frequency of strip searches, as those occur on very rare occasions. The Knowledge, Skills, and Abilities section was updated to change the typing requirement to 30 words per minute, which is in line with the typing requirement for the other administrative positions within the Police Department.


There are no recommended changes to the recruitment type (Open/Promotional) or examination weighting (100% Oral Examination with Qualifying Written and Performance).

RECOMMENDATION: Staff recommends the Civil Service Commission approve the modified job specification for Police Records Specialist II.


PREPARED BY:


Ada Chang
Management Analyst

APPROVED FOR CONTENT:


Julia Hill
Assistant Director of HR

APPROVED:


Elizabeth C. Brown
Director of Human Resources

CITY OF SANTA CLARA, CALIFORNIA
POLICE RECORDS SPECIALIST II
(643)

EDUCATION AND EXPERIENCE

Minimum Qualifications:

- Graduation from high school or its equivalent,; and
- Two years of clerical and typing experience.

Possible Substitutions:

- College education with special emphasis in police administration or related fields may be substituted for the required work experience on a year-for-year basis.

LICENSE(S) AND CERTIFICATION(S)

- Possession of an ~~appropriate~~, valid California *Class C* driver's license is required *at the time of appointment and for duration of employment*
- Successful completion of a P.O.S.T. certified Police Records Clerk Course or ability to obtain same within one year of employment

SPECIAL CONDITIONS

- ~~Incumbents of this class are assigned to work day, swing and graveyard shifts, including weekends and holidays~~
- ~~Incumbents are also required to work overtime hours as assigned~~
- ~~Incumbents are expected to become proficient in the use of self-defense, Basic First Aid, Cardiopulmonary Resuscitation (CPR) and chemical agents through training~~
- ~~Incumbents will be required to satisfactorily complete and pass biennial telecommunications training/testing as mandated by the California Department of Justice and the Federal Bureau of Investigation (National Crime Information Center) and any local or county automated systems training programs~~
- ~~All candidates will be required to pass a City background investigation, which will include fingerprinting and may include polygraph and/or psychological testing~~

TYPICAL TASKS/DUTIES

~~Each position in this classification may not include all the duties listed below, nor do the examples cover all the duties that may be performed. Duties may include, but are not limited to, the following:~~

~~Under general supervision:~~

- ~~Performs complex specialized recordkeeping and tasks related to police functions by using automated and manual systems~~

POLICE RECORDS SPECIALIST II (continued)

- Completes and types/transcribes a variety of material such as written or dictated reports, arrest reports and/or fingerprint cards, and correspondence from recorded information, rough drafts, marginal notes, or verbal instructions
- Checks, indexes, updates, routes, and files reports, correspondence, records, and citations
- Answers inquiries and complaints from the public at the counter and by telephone, providing and obtaining information in accordance with prescribed policies and regulations, and obtains pertinent information regarding complaints in accordance with prescribed policies and regulations
- Operates two-way police radio, computer terminals, and other standard office equipment such as telephone, typewriter, dictation machine, copy machine, and calculator
- Using radio, computer terminal, and other appropriate equipment, provides officers in the field with information on individuals and vehicles and sends, receives, and updates information on the status of warrants
- Accepts bail, keeps records
- Takes police reports over the telephone and at the front counter
- May interact with distressed prisoners and young children
- May be required to perform pat *searches*, or strip searches *on rare occasions*, on persons of the same gender in custody
- Assist in the booking process or accompany officer in the transportation of prisoners to county jail or juveniles to a detention facility or home
- Testifies in court as required
- Uses interpersonal skills in dealing with irate persons and emergency situations
- May be required to perform the duties of a Police Records Specialist I
- Performs other related duties as assigned

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Office methods and machines including, but not limited to, personal computers; business English; spelling; and arithmetic

Ability to:

- Communicate clearly and effectively in English in person, over the telephone, and over the two-way police radio, enunciating clearly and distinctly
- Communicate clearly and effectively in writing by using correct English grammar, spelling, and punctuation
- Perform clerical work including filing, both rapidly and accurately
- Handle multiple priorities, organize workload, and meet strict deadlines
- Work in a team-based environment and achieve common goals
- Establish and maintain tactful, courteous, and effective working relationships with those contacted in the course of work, including the general public
- Understand and carry out written and oral instructions
- Control prisoners
- Learn standard police broadcasting codes and procedures and the operation of radio receiving and transmitting equipment
- Type 50-30 net words a minute from clear copy

POLICE RECORDS SPECIALIST II (continued)

SUPERVISION RECEIVED

Works under the direct supervision of the Police Records Supervisor, a uniformed officer of the rank of Sergeant, or other uniformed officer as assigned.

SUPERVISION EXERCISED

May assist in the training of new clerical personnel.

OTHER REQUIREMENTS

- *Incumbents of this class are assigned to work day, swing and graveyard shifts, including weekends and holidays*
- *Incumbents are also required to work overtime hours as assigned*
- *Incumbents are expected to become proficient in the use of self-defense, Basic First Aid, and Cardiopulmonary Resuscitation (CPR)*
- *Incumbents will be required to satisfactorily complete and pass biennial telecommunications training/testing as mandated by the California Department of Justice and the Federal Bureau of Investigation (National Crime Information Center) and any local or county automated systems training programs*
- *All candidates will be required to pass a City background investigation, which will include fingerprinting and may include polygraph and/or psychological testing*
- **Must be able to perform all of the essential functions of the job assignment.**

CITY OF SANTA CLARA, CALIFORNIA
POLICE RECORDS SPECIALIST II
(643)

EDUCATION AND EXPERIENCE

Minimum Qualifications:

- Graduation from high school or its equivalent; and
- Two years of clerical and typing experience.

Possible Substitutions:

- College education with special emphasis in police administration or related fields may be substituted for the required work experience on a year-for-year basis.

LICENSES AND CERTIFICATIONS

- Possession of a valid California Class C driver's license is required at the time of appointment and for duration of employment
- Successful completion of a P.O.S.T. certified Police Records Clerk Course or ability to obtain same within one year of employment

TYPICAL DUTIES

Duties may include, but are not limited to, the following:

Under general supervision:

- Performs complex specialized recordkeeping and tasks related to police functions by using automated and manual systems
- Completes and types/transcribes a variety of material such as written or dictated reports, arrest reports and/or fingerprint cards, and correspondence from recorded information, rough drafts, marginal notes, or verbal instructions
- Checks, indexes, updates, routes, and files reports, correspondence, records, and citations
- Answers inquiries and complaints from the public at the counter and by telephone, providing and obtaining information in accordance with prescribed policies and regulations, and obtains pertinent information regarding complaints in accordance with prescribed policies and regulations
- Operates two-way police radio, computer terminals, and other standard office equipment such as telephone, typewriter, dictation machine, copy machine, and calculator
- Using radio, computer terminal, and other appropriate equipment, provides officers in the field with information on individuals and vehicles and sends, receives, and updates information on the status of warrants
- Accepts bail, keeps records
- Takes police reports over the telephone and at the front counter
- May interact with distressed prisoners and young children
- May be required to perform pat searches, or strip searches on rare occasions, on persons of the same gender in custody

POLICE RECORDS SPECIALIST II (continued)

- Assist in the booking process or accompany officer in the transportation of prisoners to county jail or juveniles to a detention facility or home
- Testifies in court as required
- Uses interpersonal skills in dealing with irate persons and emergency situations
- May be required to perform the duties of a Police Records Specialist I
- Performs other related duties as assigned

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Office methods and machines including, but not limited to, personal computers; business English; spelling; and arithmetic

Ability to:

- Communicate clearly and effectively in English in person, over the telephone, and over the two-way police radio, enunciating clearly and distinctly
- Communicate clearly and effectively in writing by using correct English grammar, spelling, and punctuation
- Perform clerical work including filing, both rapidly and accurately
- Handle multiple priorities, organize workload, and meet strict deadlines
- Work in a team-based environment and achieve common goals
- Establish and maintain tactful, courteous, and effective working relationships with those contacted in the course of work, including the general public
- Understand and carry out written and oral instructions
- Control prisoners
- Learn standard police broadcasting codes and procedures and the operation of radio receiving and transmitting equipment
- Type 30 net words a minute from clear copy

SUPERVISION RECEIVED

Works under the direct supervision of the Police Records Supervisor, a uniformed officer of the rank of Sergeant, or other uniformed officer as assigned.

SUPERVISION EXERCISED

May assist in the training of new clerical personnel.

OTHER REQUIREMENTS

- Incumbents of this class are assigned to work day, swing and graveyard shifts, including weekends and holidays
- Incumbents are also required to work overtime hours as assigned
- Incumbents are expected to become proficient in the use of self-defense, Basic First Aid, and Cardiopulmonary Resuscitation (CPR)
- Incumbents will be required to satisfactorily complete and pass biennial telecommunications training/testing as mandated by the California Department of Justice and the Federal Bureau of Investigation (National Crime Information Center) and any local or county automated systems training programs

POLICE RECORDS SPECIALIST II (continued)

- All candidates will be required to pass a City background investigation, which will include fingerprinting and may include polygraph and/or psychological testing
- Must be able to perform all of the essential functions of the job assignment.

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Adopt Job Specification, Recruitment Type and Examination Weighting for Fire Protection Engineer


SUMMARY: The Fire Department has a new budgeted position for Fire Protection Engineer. This new classification was created as part of the fiscal year 2016-2017 Budget and will be included in Unit 10.

Attached is a memorandum from the Fire Chief requesting that the Commission approve the new job description for Fire Protection Engineer. The new job description reflects the duties the incumbents will be expected to perform in fire prevention, including complex reviews of plans and specifications for buildings, fire protection equipment, and industrial process. The Typical Duties and Knowledge, Skills, and Abilities sections demonstrate the technical knowledge and related abilities needed pertaining to fire protection and engineering.

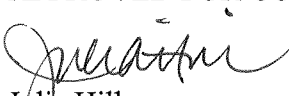
It is recommended that the recruitment type for Fire Protection Engineer be Open/Competitive. It is also recommended that the exam weighting for Fire Protection Engineer be 100% Oral.

RECOMMENDATION: Staff recommends the Civil Service Commission approve the proposed job specification for Fire Protection Engineer, and establish the recruitment type as Open/Competitive, with an examination weighting of 100% Oral.


PREPARED BY:


Ada Chang
Management Analyst

APPROVED FOR CONTENT:


Julia Hill
Assistant Director of HR

APPROVED:


Elizabeth C. Brown
Director of Human Resources



Date: September 7, 2017
To: Director of Human Resources
From: Fire Chief
Subject: Request to Approve Job Specifications for Fire Protection Engineer

The Fire Department is requesting approval for the job specification, recruitment type and examination weighting for the position of Fire Protection Engineer.

The Fire Protection Engineer position will be assigned to the Fire Prevention and Hazardous Materials Division of the Fire Department. The creation of the Fire Protection Engineer was a recommendation of the recent Council commissioned staffing study conducted by Citygate and Associates to provide improved plan review services, additional field inspection hours, and promotional opportunities for existing staff in order to retain talented employees.

If you have any detailed questions regarding this request, please feel free to contact Fire Marshal Jake Tomlin.

Thank you,

William G. Kelly
Fire Chief

CITY OF SANTA CLARA, CALIFORNIA
FIRE PROTECTION ENGINEER
(New)

EDUCATION AND EXPERIENCE

Minimum Qualifications:

- Graduation from an accredited college or university with a Bachelor's degree in Fire Protection, Civil Engineering, or Mechanical Engineering; and
- Three (3) years of full time experience in fire protection engineering.

Desirable Qualifications:

- Registration as a licensed Fire Protection Engineer in the State of California is desirable.

LICENSE AND/OR CERTIFICATIONS

- Possession of a valid California Class C driver's license is required at time of appointment and for the duration of employment.

DISTINGUISHING CHARACTERISTICS

The Fire Protection Engineer position is a non-sworn position that performs moderate to complex review of plans and specifications for buildings, fire protection equipment, and industrial processes; and serves in an advisory capacity to department staff on a variety of fire protection requirements and procedures.

TYPICAL DUTIES:

Duties may include, but are not limited to, the following:

With general direction:

- Reviews and evaluates sprinkler systems, fire main installations, detection and alarm systems, smoke control systems, and other fire protection components for code compliance
- Reviews residential, commercial, and industrial plans and specifications for compliance with State and Local fire prevention codes and ordinances
- Reviews and evaluates site construction and all other system plans to ensure compliance with applicable regulations, standards, and codes
- Issues written correspondence outlining code interpretations and deficiencies found in plan review
- Provides technical assistance and guidance to architects, engineers, developers, contractors, building owners, and various fire department personnel by providing technical interpretations of building and fire codes as they apply to a jurisdiction
- Reviews site development plans to ensure adequate water supply and fire hydrant availability; tests water distribution systems, and places hydrants and water main locations for new developments
- Conducts engineering computations such as fire flow, hydraulic design, building areas, and occupant loads
- Conducts fire safety inspections of buildings, structures, premises and installations to enforce compliance with Federal, State and local fire safety laws, codes and regulations.

FIRE PROTECTION ENGINEER (continued)

- Reviews proposals and recommends modifications, reviews technical literature and proposes new fire protection procedures
- Assists in the training of various Department personnel with regards to fire science, fire protection components, and fire inspections
- Prepares clear, concise, and comprehensive technical reports, analyzes complex fire protection issues, and makes recommendations
- May perform specialized types of field inspections as directed by the Deputy Fire Marshal III, Assistant Fire Marshal or Fire Marshal
- Conducts fire safety inspections of weekend fairs or festivals, public fireworks displays and other special events
- Performs other related duties as assigned

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

- Principles and practices of modern fire protection engineering concepts
- Fire protection and fire inspection standards, codes, ordinances, rules, and regulations
- Structural fire protection, fire hazard control, and fire extinguishing detection/alarm systems
- Safety standards in structures where hazardous solids, liquids, or gases are to be manufactured, used, or stored
- National Fire Protection Association standards
- Standards of building design, construction, and materials

Ability to:

- Comprehend and evaluate building plans and specifications including fire suppression, alarm, and detection systems
- Conduct and evaluate engineering computations
- Analyze and evaluate statistical data
- Effectively handle multiple priorities, organize workload and meet strict deadlines
- Establish and maintain a cooperative working relationship with those contacted in the course of work, including the general public
- Communicate effectively, both orally and in writing
- Maintain a calm and professional demeanor in a confrontational or difficult situation
- Walk or stand for extended periods of time
- Bend, stoop, reach, carry, crawl, climb and lift up to 50 pounds as necessary to perform assigned duties

SUPERVISION RECEIVED

Works under the supervision of the Deputy Fire Marshal III, Assistant Fire Marshal, or Fire Marshal.

SUPERVISION EXERCISED

May supervise staff or act as lead supervisor to those assigned to a task, program or project.

OTHER REQUIREMENTS:

- Candidates will be required to pass a City background investigation which will include fingerprinting, to meet Federal, State and/or industry security requirements.

FIRE PROTECTION ENGINEER (continued)

- Must be able to perform all the essential functions of the job assignment.

CONFLICT OF INTEREST

Incumbents in this position are required to file a Conflict of Interest statement upon assuming office, annually, and upon leaving office, in accordance with City Manager Directive 100.

AGENDA REPORT CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Adopt Job Specification, Establish Recruitment Type, and Establish Examination Weighting for Fleet Coordinator

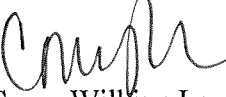
SUMMARY: The Public Works Department will soon conduct a recruitment to fill one vacancy for the position of Fleet Coordinator. This is a new classification created in the fiscal year 2017-2018 Budget.

Attached is a memorandum from the Fleet Manager requesting that the Commission approve the new job description for Fleet Coordinator. A job analysis was conducted to determine the job duties and knowledge, skills, and abilities needed for the Fleet Coordinator classification. The new job description is reflective of the duties the incumbents will be expected to perform such as, maintaining compliance of policies and practices, cost accounting, inventory operations, fuel management, training, and data processing.

It is recommended that the recruitment type for Fleet Coordinator be Open/Promotional. It is also recommended that the exam weighting for this classification be 100% Oral Examination. This will allow the department the opportunity to evaluate the candidates' skills through a comprehensive interview.

RECOMMENDATION: Staff recommends the Civil Service Commission approve the proposed job specification for Fleet Coordinator, and establish the recruitment type as Open/Promotional, with an examination weighting of 100% Oral Examination.


PREPARED BY:


Corey Wilkins-Lee
HR Technician

APPROVED FOR CONTENT:


Julia Hill
Assistant Director of HR

APPROVED:


Elizabeth C. Brown
Director of Human Resources



Date: August 23, 2017
To: Human Resources
From: Fleet Manager
Subject: Fleet Coordinator Job Description

SUMMARY: Fleet Management has written a new job classification, Fleet Coordinator to better reflect the needs of the department for the current environment and into the future.

Department of Public Works, Fleet Management Division is going through a restructuring of the administrative staff to better meet the demands of today's Fleet environment and better prepare for the future. Over the past several years Fleet Management has decreased its administrative staff while increasing its duties. The new position is taking place of the Fleet Assistant. The Fleet Assistant has taken on significant administrative duties subsequent to the vacancy of the Automotive Services Coordinator, Account Clerk II and Account Clerk I.

An Associate Degree or Certificate from a Technician Trade School was added to the desirable qualifications along with experience in Fleet Management applications systems. Knowledge of service and repair technology, emissions compliance, and various computer software applications were added to the Knowledge, Skills, and Abilities.

Chris Fazzi

cc: Dave Staub

CITY OF SANTA CLARA, CALIFORNIA
FLEET COORDINATOR
(466)

EDUCATION AND EXPERIENCE

Minimum Requirements:

- Graduation from high school; and
- Five (5) years of recent progressively responsible administrative and technical experience in fleet operations and maintenance.

Desirable Qualifications:

- Associate Degree from an accredited college in Automotive Repair or Certificate of Achievement from an Automotive Repair Trade School is desirable.
- Experience with both gasoline and diesel powered equipment is desirable.
- Experience with automotive fleet management systems, preferably Asset Solution and Fuel-Master are desirable.

LICENSES AND CERTIFICATES

Possession of a valid California Class C driver's license is required at time of appointment and for the duration of employment.

DISTINGUISHING CHARACTERISTICS

The Fleet Coordinator classification performs administrative assignments in support of Fleet Management, which involves maintaining compliance of policies and practices, cost accounting, inventory operations, fuel management, equipment asset management, warranty and recall administration, training, and data processing.

TYPICAL DUTIES

Duties may include, but are not limited to, the following:

Under general direction:

- Acts as main liaison for scheduling, assigning, and inspecting vehicles and equipment for services and visible repairs; prepares initial work order information
- Sets priorities, organizes workload, and establishes daily tasks for Automotive Technicians and Utility Workers
- Ensures vehicles are compliant with Federal, State, and local vehicle codes and safety regulations, including but not limited to licensing, registration, and vehicle emissions
- Uses Faster Asset Solution to input invoices for processing
- Receives and replies to oral and written requests for information from those contacted in the course of work
- Makes budget recommendations for repair cost estimates
- Organizes, maintains, and reviews the preventative maintenance program for scheduling and records maintenance of vehicles and equipment

FLEET COORDINATOR (continued)

- Utilizes Fuel-Master to program and issue fuel keys, as well as diagnose and repair fueling concerns; monitors fuel levels using Fuel Monitoring software
- Performs quality assurance/quality control inspections on electronic work orders and equipment
- Gathers vehicle information, inputs into Faster Asset Solution, and disperses it to the appropriate parties
- Moves material to and from storage and loading areas by hand truck or forklift
- May act as the Senior Materials Handler in their absence
- Performs other related duties as assigned

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Mechanical repair service and parts terminology for vehicles and equipment
- Service and repair technology related to a wide variety of motorized vehicles and equipment including gasoline and diesel engines
- Shop tools, equipment, procedures, and safety practices used in the overhaul, repair and adjustment of motor vehicles and equipment
- Federal, State, and local vehicles codes and safety regulations
- Office and environmental safety practices, procedures and standards, including OSHA, CEQA, and emissions
- Computer and software applications used in business setting and Fleet Management

Ability to:

- Communicate clearly, concisely, and effectively, both orally and in writing
- Follow oral and written instructions
- Establish and maintain cooperative working relationship with those contacted in the course of work
- Exercise independent and sound judgment in stressful situations with minimal supervision
- Effectively handle multiple priorities, organize workload and meet strict deadlines
- Train other employees as required
- Operate a forklift
- Walk or stand for extended periods of time
- Bend, stoop, reach, carry, crawl, climb and lift as necessary to perform assigned duties

SUPERVISION RECEIVED

Works under the general supervision of the Automotive Foreman/Forewoman and Fleet Manager.

SUPERVISION EXERCISED

None.

OTHER REQUIREMENTS

Must be able to perform all of the essential functions of the job assignment.

AGENDA REPORT CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Modify Job Specification for Customer Service Representative

SUMMARY: The Finance Department will soon conduct a recruitment for the position of Customer Service Representative. The job specification for Customer Service Representative was last approved in May 2004.

A job analysis was conducted to identify additions and changes to the job specification. The Distinguishing Characteristics section was updated to include handling difficult inquiries. Proposed changes to the Typical Duties section was updated to include items such as receiving, processing and auditing business tax certificates and license affidavits for completeness and accuracy, and processing petty cash including advances and reimbursements. The Knowledge, Skills and Abilities section was updated to include knowledge of computer applications (such as Microsoft Word, Access, Excel and PowerPoint), knowledge of office safety, practices, procedures and standards, ability to count cash and make change accurately, ability to perform basic arithmetic computations with speed and accuracy, and ability to recommend programs and services based on the customer's interest and needs. The job specification has also been updated to reflect the new standard job description format.

There are no recommended changes to the examination weighting (100% Oral examination, Qualifying Written and Performance) or the recruitment type (Open/Competitive) for this classification.

RECOMMENDATION: Staff recommends the Civil Service Commission approve the modified job specification for Customer Service Representative.

PREPARED BY:



Christine Doan
HR Technician

APPROVED FOR CONTENT:



Julia Hill
Human Resources Assistant Director

APPROVED:



Elizabeth C. Brown
Director of Human Resources



**City of
Santa Clara**
The Center of What's Possible

RECEIVED
AUG 18 2017
HUMAN RESOURCES DEPARTMENT
CITY OF SANTA CLARA
Memorandum

Date: August 17, 2017

To: Director of Human Resources

From: Director of Finance

Subject: Request to Modify Job Specification for Customer Service Representative

Due to recent promotions, the Finance Department will soon begin a recruitment to fill three (3) vacant Customer Service Representative positions. The job specification for this recruitment includes basic knowledge of customer service principles and procedures, verbal and written communication skills, and the ability to provide excellent customer service to the public and staff.

We recommend that the job specification for the Customer Service Representative position be revised to delete the typing certification requirement since it no longer pertains to the basic job duties and update the skills and abilities section to include updated current office practices and skill sets in order to:

- Attract experienced, qualified, and skilled candidates to support the City's mission of serving the community with resourceful, efficient, progressive, and professional customer service.
- Broaden the candidate pool to ensure a sufficient number of qualified applicants.

Thank you for your consideration.


Angela Kraetsch
Acting Director of Finance

cc: Michelle Eglesia, Municipal Services Division Manager

LEGEND:

Additions

Deletions

Approved May, 2004

Proposed September, 2017

CITY OF SANTA CLARA, CALIFORNIA
CUSTOMER SERVICE REPRESENTATIVE

(364)

EDUCATION AND EXPERIENCE

Minimum Qualifications:

- Graduation from high school or possession of a GED; and
- One (1) year of experience in banking, business license processing, call center operations, cashiering, customer service, and/or utility billing, preferably with a municipal or utility agency

LICENSES AND/OR CERTIFICATES

- ~~None required~~

DISTINGUISHING CHARACTERISTICS

The Customer Service Representative is the entry-level classification in the Customer Service Representative series. This classification has a primary focus on providing superior customer service to the citizens and customers of the City of Santa Clara in handling a variety of customer account and billing issues. Incumbents in this classification ~~must maintain professionalism and courtesy when exposed to stressful situations and~~ may be assigned to answer telephone calls, *handle difficult inquiries*, perform cashiering duties, process business licenses, and perform functions associated with customer billing, analysis, account adjustments, collections, or the financial assistance programs offered to utility customers. This classification is distinguished from the Senior Customer Service Representative in that the latter is a lead worker position requiring a greater degree of technical knowledge, analytical ability, and independent judgment.

TYPICAL DUTIES

~~Each position in this classification may not include all the duties listed below, nor do the examples cover all duties that may be performed.~~

Duties may include, but are not limited to, the following:

Under general supervision:

- Assists customers ~~at the counter and on the~~ *in person, by telephone, and in writing* by answering inquiries, responding to complaints, and explaining department policies and procedures
- Receives, processes, and audits *business tax certificates and license affidavits, utility service applications, and other materials pertaining to utility accounts for completeness and accuracy*; assists with the processing of delinquent accounts, *including negotiating payment arrangements*

CUSTOMER SERVICE REPRESENTATIVE (Continued)

- Receives and processes payment of various bills, permits, licenses, and fees *including making change for cash payments*; traces payments received without remittance advice to determine account to be credited
- Processes petty cash including advances and reimbursements
- Balances and tracks financial transactions
- Updates and maintains electronic and/or paper records of all transactions involving customer accounts, including monies received and customer calls
- Validates utility registers, removes statements that are in error and prepares corrected statements and transmittal sheets
- Calculates customers' average monthly consumption to estimate utility costs *and notifies customers about status changes related to their tax or utility accounts*
- Researches customer records and acts as liaison between customers, contractors, and other City departments to resolve inquiries and explain City code and/or utility rates related to Municipal Services tax and utility billing requirements
- Educates customers about the fundamentals and benefits of current and emerging programs including financial aid, solid waste, and green programs to drive participation results

~~Reviews, processes, and updates business license affidavits~~

~~Receives and processes payment of various bills, permits, licenses, and fees; traces payments received without remittance advice to determine account to be credited~~

- ~~• Updates and maintains electronic and/or paper records of all transactions involving customer accounts, including monies received and customer calls~~
- Prepares a variety of correspondence and reports *related to business tax, billing issues, and adjustments*
- Reviews new Santa Clara businesses to ensure compliance with City code
- Runs queries from departmental computer applications
- Performs other related duties, as assigned
-

KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of:

- ~~Personal Computer hardware and software applications (such as Microsoft Word, Access, Excel and PowerPoint)~~
 - ~~•, including word processing, spreadsheet, and database programs~~
- Principles and practices of customer service
- ~~Modern Office safety procedures, practices, procedures, and equipment standards~~
- Basic accounting, bookkeeping, cashiering, and billing processes and procedures
- Cash handling

Ability to:

- Count cash and make change accurately
- Perform basic arithmetic computations with speed and accuracy
- Maintain professionalism, courtesy, and composure at all times, including stressful situations
- Establish and maintain tactful, courteous, and effective-a cooperative working relationships with those contacted in the course of work, including the general public
- Provide exceptional customer service
- Maintain accurate records and database systems

CUSTOMER SERVICE REPRESENTATIVE (Continued)

- Communicate clearly and effectively, both orally and in writing, by using correct English grammar, spelling, and punctuation
- Work in a team-based environment and achieve common goals
- Effectively handle multiple priorities, organize workload, and meet strict deadlines
- Interpret, apply, and explain established policies and procedures
- Evaluate situations, identify problems, and exercise sound independent judgment within established guidelines
- Learn City fee schedules for licenses, permits, and utility rates
- Perform data entry with speed and accuracy
- Recommend programs and services based on the customer's interest and needs
- Type accurately at a speed of at least 25 net words per minute
- Stand or walk or stand for extended periods of time and bend, stoop, and reach as necessary
- Bend, stoop, reach, carry, crawl, climb, and lift, carry, and relocate a variety of office supplies and mail weighing up to 25 pounds to perform assigned duties

SUPERVISION RECEIVED

Receives general supervision from a Customer Service Supervisor or other higher-level classification, as assigned.

SUPERVISION EXERCISED:

May assist in the training of inexperienced clerical employees.

OTHER REQUIREMENTS

- May be required to work evenings.
- Must be able to perform all the essential functions of the job assignment.

CITY OF SANTA CLARA, CALIFORNIA
CUSTOMER SERVICE REPRESENTATIVE
(364)

EDUCATION AND EXPERIENCE

Minimum Qualifications:

- Graduation from high school or possession of a GED; and
- One (1) year of experience in banking, business license processing, call center operations, cashiering, customer service, and/or utility billing, preferably with a municipal or utility agency

DISTINGUISHING CHARACTERISTICS

The Customer Service Representative is the entry-level classification in the Customer Service Representative series. This classification has a primary focus on providing superior customer service to the citizens and customers of the City of Santa Clara in handling a variety of customer account and billing issues. Incumbents in this classification may be assigned to answer telephone calls, handle difficult inquiries, perform cashiering duties, process business licenses, and perform functions associated with customer billing, analysis, account adjustments, collections, or the financial assistance programs offered to utility customers. This classification is distinguished from the Senior Customer Service Representative in that the latter is a lead worker position requiring a greater degree of technical knowledge, analytical ability, and independent judgment.

TYPICAL DUTIES

Duties may include, but are not limited to, the following:

Under general supervision:

- Assists customers in person, by telephone, and in writing by answering inquiries, responding to complaints, and explaining department policies and procedures
- Receives, processes, and audits business tax certificates and license affidavits, utility applications, and other materials pertaining to utility accounts for completeness and accuracy; assists with the processing of delinquent accounts, including negotiating payment arrangements
- Receives and processes payment of various bills, permits, licenses, and fees including making change for cash payments; traces payments received without remittance advice to determine account to be credited
- Processes petty cash including advances and reimbursements
- Balances and tracks financial transactions
- Updates and maintains electronic and/or paper records of all transactions involving customer accounts, including monies received and customer calls
- Validates utility registers, removes statements that are in error and prepares corrected statements and transmittal sheets
- Calculates customers' average monthly consumption to estimate utility costs and notifies customers about status changes related to their tax or utility accounts

CUSTOMER SERVICE REPRESENTATIVE (continued)

- Researches customer records and acts as liaison between customers, contractors, and other City departments to resolve inquiries and explain City code and/or utility rates related to Municipal Services tax and utility billing requirements
- Educates customers about the fundamentals and benefits of current and emerging programs including financial aid, solid waste, and green programs to drive participation results
- Prepares a variety of correspondence and reports related to business tax, billing issues, and adjustments
- Reviews new Santa Clara businesses to ensure compliance with City code
- Runs queries from departmental computer applications
- Performs other related duties as assigned

KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of:

- Computer applications (such as Microsoft Word, Access, Excel and PowerPoint)
- Principles and practices of customer service
- Office safety practices, procedures, and standards
- Basic accounting, bookkeeping, cashiering, and billing processes and procedures
- Cash handling

Ability to:

- Count cash and make change accurately
- Perform basic arithmetic computations with speed and accuracy
- Maintain professionalism, courtesy, and composure at all times, including stressful situations
- Establish and maintain a cooperative working relationship with those contacted in the course of work, including the general public
- Provide exceptional customer service
- Maintain accurate records and database systems
- Communicate effectively; both orally and in writing
- Work in a team-based environment and achieve common goals
- Effectively handle multiple priorities, organize workload, and meet strict deadlines
- Interpret, apply, and explain established policies and procedures
- Evaluate situations, identify problems, and exercise sound independent judgment within established guidelines
- Learn City fee schedules for licenses, permits, and utility rates
- Perform data entry with speed and accuracy
- Recommend programs and services based on the customer's interest and needs
- Walk or stand for extended periods of time
- Bend, stoop, reach, carry, crawl, climb, and lift up to 25 pounds to perform assigned duties

SUPERVISION RECEIVED

Receives general supervision from a Customer Service Supervisor or other higher-level classification, as assigned.

SUPERVISION EXERCISED:

May assist in the training of inexperienced clerical employees.

CUSTOMER SERVICE REPRESENTATIVE (continued)

OTHER REQUIREMENTS

- May be required to work evenings.
- Must be able to perform all the essential functions of the job assignment.

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Modify Job Specifications for Senior Accounting Technician

SUMMARY: The Finance Department will soon conduct a recruitment to fill a Senior Accounting Technician vacancy. The job specification for Senior Accounting Technician was last revised January of 2008.

A job analysis was conducted to identify additions and changes to the job specification. The minimum qualifications section updated the education and experience to include Finance or related field. The Typical Duties section was changed to reflect the current tasks this position would perform, such as serves as lead Accounting Technician, handles complaints and escalates problems, and researches and responds to inquiries regarding complex payroll issues. The Knowledge, Skills, and Abilities section was updated to include additional analytical skills, supervisory and leadership skills, and interpersonal skills.

There are no recommended changes to the recruitment type (Open/Promotional) or examination weighting (100% Oral Examination and Qualifying Performance).


RECOMMENDATION: Staff recommends the Civil Service Commission approve the modified job specifications for Senior Accounting Technician.

PREPARED BY:



Corey Wilkins-Lee
HR Technician

APPROVED FOR CONTENT:



Julia Hill
Assistant Director of HR

APPROVED:



Elizabeth C. Brown
Director of Human Resources



City of Santa Clara

The Center of What's Possible

Finance Department Memorandum

RECEIVED

Date: August 23, 2017
To: Human Resources
From: Accounting Division Manager
Subject: Senior Accounting Technician Job Description

AUG 23 2017

HUMAN RESOURCES DEPARTMENT
CITY OF SANTA CLARA

The Finance Department Accounting Services Division has revised the Senior Accounting Technician job description to better reflect the duties of the position between each of its three functional areas of general accounting, accounts payable, and payroll. The common duties associated with these three areas were compiled and listed as applicable to all areas rather than being repeated throughout. Also, duties that were no longer associated with this position were removed and new duties for each functional area were added where appropriate.

David Noce

cc: Angela Kraetsch

LEGEND:

Additions

~~Deletions~~

Proposed September, 2017

Approved January, 2008

CITY OF SANTA CLARA, CALIFORNIA

SENIOR ACCOUNTING TECHNICIAN

(208)

EDUCATION AND EXPERIENCE

Minimum Qualifications:

- Associate Degree in Accounting, *Finance or related field*; ~~or completion of sixty (60) semester units or ninety (90) quarter units from an accredited college or university including at least twenty four (24) semester units or (36) thirty six quarter units in Accounting or Bookkeeping; and~~
- Four (4) years work experience in Finance/Accounting (accounts receivable, account payable, payroll, or general or public accounting); ~~and~~
- ~~Experience with electronic spreadsheet and word processing programs;~~
- ~~Experience with on-line financial systems; and~~
- ~~Ten-key by touch.~~

Desirable Qualifications:

- Experience with PeopleSoft Financial and/or Human Resources/Payroll Systems.

Possible Substitutions

- Two years of additional qualifying experience may be substituted for the required education on the basis of one (1) year of experience equals fifteen (15) semester units. (There is no substitution allowed for the requirement for fourteen (14) semester or twenty one (21) quarter units in Accounting and Bookkeeping.)

LICENSE

~~Possession of a valid California Class C driver's license is desirable.~~

DISTINGUISHING CHARACTERISTICS

This is a paraprofessional position in the classified service and is distinguished from the next lower level of Accounting Technician II in that positions at this level require the frequent use of a high degree of independent judgment and interpretative ability related to a technical knowledge of accounting, computer applications, on-line financial systems, and applicable laws and regulations.- Incumbents in this class use computer applications on a daily basis in accomplishing their work.- Incumbents in this class are expected to supervise and provide technical guidance to other personnel~~staff~~.

TYPICAL DUTIES

Duties include, but are not limited to, the following:

SENIOR ACCOUNTING TECHNICIAN -(continued)

Under general direction:

For all Divisions:

- Serves as lead Accounting Technician; handles complaints and escalates problems
- Supervises, trains, evaluates, and schedules the work of staff as assigned
- Uses ~~Computer~~ computer applications, (such as Peoplesoft~~PeopleSoft~~, QuickBooks~~,~~ and Microsoft Word, Access, Excel, and ~~Powerpoint~~PowerPoint), to maintain databases~~,~~ and spreadsheets, including data management;
- Answers inquiries from City staff, City vendors, and the general public
- Performs other related duties as assigned

For General Accounting:

~~Under general supervision:~~

- Prepares journal entries to record routine or adjusting transactions;
- Analyzes account activity in the financial system;
- Prepares data analysis and reports using Excel;
- Prepares year-end fixed asset analysis and reports;
- Issues tags to departments for fixed asset purchases and enters information into an on-line asset tracking software program;
- ~~Supervises, trains, and schedules the work of staff as assigned;~~
- ~~Use computer applications, prepares memos and procedural documentation;~~
- ~~Operates office machines and common office equipment including a personal computer, copier and facsimile machine;~~
- ~~Answers inquiries from City staff, outside city contacts; and~~
- ~~Performs other related duties as assigned.~~

For Accounts Payable:

~~Under general supervision:~~

- Processes the City's financial transactions in compliance with laws, regulations, and City policy working closely with staff in all City Departments and outside City ~~contacts~~vendors;
- Reviews and processes the City's Accounts Payable transactions within the deadlines;
- Reviews transactions for accurate general ledger account coding and prepares documentation for corrective action;
- ~~Using~~Uses on-line accounts payable system, processes vendor invoices and initiates periodic vendor check printing and prints or prepares reports for inclusion in City Council agenda package;
- Calculates and records interest charges, sales tax and trade discounts;
- Prepares the Sales Tax and Fuel Tax returns and filings as needed using computer spreadsheet applications;
- Reviews progress payments on City construction contracts;
- ~~Schedules and checks the work of other personnel as assigned;~~
- ~~Supervises, trains, and schedules the work of staff as assigned;~~
- ~~Answers inquiries from City staff, the general public and City vendors;~~
- ~~Using PC applications, prepares memos and procedural documentation;~~
- ~~Operates office machines and common office equipment including a personal computer, copier and facsimile machine; and~~

SENIOR ACCOUNTING TECHNICIAN -(continued)

- ~~Performs other related duties as assigned.~~

For Payroll:

Under general supervision:

- Enters payroll transactions online and verifies input against the source documents;
- ~~Accurately follows~~ *Follows* established business process documentation;
- Uses queries and computer applications to maintain control totals of base salaries City wide and balance salaries to payroll on a biweekly basis;
- Analyzes original documents and determines necessary system entries;
- Processes the City-wide payroll within the established deadlines;
- ~~Working closely with City staff in all departments, reviews~~ *Reviews and analyzes* departmental payroll submissions for compliance with *Memoranda of Understanding*, laws, regulations, and City policy and makes adjustments where necessary;
- Processes levies, judgments and injury compensation payments, *and other transactions as needed* in accordance with laws and regulations;
- ~~Analyzes and implements Memoranda of Understanding provisions relating to payroll processing;~~
- Reviews or reconciles biweekly distribution of salaries, compensation, deductions, and benefits including retirement;
- Prepares or reviews biweekly, monthly, quarterly, and annual reports of payroll taxes and other payroll-related financial information using computer applications (electronic spreadsheets and word processing) and on-line financial system;
- ~~Reconciles employee deductions to the GL~~ *general ledger;*
- *Researches and responds to inquiries regarding complex payroll issues*
- Updates knowledge of City and other agency payroll requirements by reading technical literature;
- ~~Uses queries and reports, reviews transactions for compliance with City policies, procedures and Memoranda of Understanding;~~
- ~~Works with City employees and departments, as well as other outside City contacts;~~
- ~~Implements payroll accounting for judgments, tax levies, injury compensation payments, and other transactions as needed;~~
- ~~Supervises, trains, and schedules the work of staff as assigned;~~
- ~~Using computer applications, prepares memos and procedural documentation;~~
- ~~Operates office machines and common office equipment including a personal computer, copier and facsimile machine; and~~
- ~~Performs other related duties as assigned.~~

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Accounts payable and payroll processing tasks;
- Accounting principles, practices, -methods, and procedures;
- Arithmetical calculations;
- Automated on-line accounting and financial reporting systems;
- *Complex spreadsheets and database applications*
- *Principles and practices of supervision, leadership, training, and performance evaluation*

SENIOR ACCOUNTING TECHNICIAN -(continued)

- Research methods and techniques *statistical analysis*; and
- Maintaining organization of *Organizing* paper records and electronic records;
- City contracts and policies, and state and federal laws and reporting requirements;
- *Report and letter writing*
- *Principles and practices of customer service that supports the establishment of strong interpersonal relationships*
- *Computer applications such as PeopleSoft, Microsoft Word, Access, Excel, and PowerPoint*
- *Correct English usage, including spelling, grammar, and punctuation*
- Office safety practices, procedures and standards;
- ~~Pertinent City functions, policies, rules and regulations;~~

Ability to:

- Effectively perform responsible, and complex accounting work with speed and accuracy;
- Interpret, *explain*, and apply ~~administrative and departmental~~ *City Memoranda of Understanding*, policies, laws, and rules;
- Research, analyze and investigate *financial and accounting records* ~~work-related issues~~ and suggest *document work improvements*;
- Provide technical and functional supervision and training to staff
- *Provide lead direction and review work of assigned staff*;
- *Evaluate situations, identify problems, make logical decisions and follow through on resolution*;
- Effectively handle multiple priorities, organize workload and meet strict deadlines;
- Establish and maintain effective working relationships with those contacted in the course of work;
- Deal tactfully and courteously with others, including all levels of City staff, City vendors and the general public;
- Perform excellent customer service;
- Work in a team-based environment and achieve common goals;
- Follow and carry out complex oral and written instructions;
- Communicate ~~clearly, tactfully and effectively~~, both orally and in writing ~~with staff and City vendors~~;
- Type from clear copy at a net rate of not less than 25 words per minute on a computer keyboard; and
- Walk or stand for extended periods of time and
- ~~bend~~ *Bend*, stoop, reach, carry, *crawl*, climb, and lift as necessary to perform assigned duties.
- ~~Lead or influence others positively to achieve desired results;~~
- ~~Compose general correspondence, letters and reports;~~
- ~~Spell correctly and use proper English grammar;~~
- ~~Analyze work and suggest and document work improvements;~~
- ~~Analyze and interpret financial and accounting records;~~
- ~~Perform tasks without being told, working in the best interest of the City;~~

SUPERVISION RECEIVED

Works under the general supervision of the Accountant, Principal Accountant, or Accounting Services Division Manager as assigned.

SUPERVISION EXERCISED

Supervises Accounting Technicians I and II or other classifications as assigned.

SENIOR ACCOUNTING TECHNICIAN -(continued)

OTHER REQUIREMENTS

- May be required to work unusual hours and weekends in the performance of their duties.
- Must be able to perform all of the essential functions of the job assignment.

CITY OF SANTA CLARA, CALIFORNIA
SENIOR ACCOUNTING TECHNICIAN
(208)

EDUCATION AND EXPERIENCE

Minimum Qualifications:

- Associate Degree in Accounting, Finance or related field;
- Four (4) years experience in Finance/Accounting (accounts receivable, account payable, payroll, or general or public accounting);

Desirable Qualifications:

- Experience with PeopleSoft Financial and/or Human Resources/Payroll Systems.

Possible Substitutions

- Two years of additional qualifying experience may be substituted for the required education.

DISTINGUISHING CHARACTERISTICS

This is a paraprofessional position in the classified service and is distinguished from the next lower level of Accounting Technician II in that positions at this level require the frequent use of a high degree of independent judgment and interpretative ability related to a technical knowledge of accounting, computer applications, on-line financial systems, and applicable laws and regulations. Incumbents in this class use computer applications on a daily basis in accomplishing their work. Incumbents in this class are expected to supervise and provide technical guidance to staff.

TYPICAL DUTIES

Duties include, but are not limited to, the following:

Under general direction:

For all Divisions:

- Serves as lead Accounting Technician; handles complaints and escalates problems
- Supervises, trains, evaluates, and schedules the work of staff as assigned
- Uses computer applications, such as PeopleSoft, Microsoft Word, Access, Excel, and PowerPoint, to maintain databases and spreadsheets, including data management
- Answers inquiries from City staff, City vendors, and the general public
- Performs other related duties as assigned

For General Accounting:

- Prepares journal entries to record routine or adjusting transactions
- Analyzes account activity in the financial system
- Prepares data analysis and reports using Excel
- Prepares year-end fixed asset analysis and reports

SENIOR ACCOUNTING TECHNICIAN (continued)

- Issues tags to departments for fixed asset purchases and enters information into an on-line asset tracking software program

For Accounts Payable:

- Processes the City's financial transactions in compliance with laws, regulations, and City policy working closely with staff in all City Departments and outside City vendors
- Reviews and processes the City's Accounts Payable transactions within the deadlines
- Reviews transactions for accurate general ledger account coding and prepares documentation for corrective action
- Uses on-line accounts payable system, processes vendor invoices and initiates periodic vendor check printing and prints or prepares reports for inclusion in City Council agenda package
- Calculates and records interest charges, sales tax and trade discounts;
- Prepares the Sales Tax and Fuel Tax returns and filings as needed using computer spreadsheet applications
- Reviews progress payments on City construction contracts

For Payroll:

- Enters payroll transactions online and verifies input against the source documents
- Follows established business process documentation
- Uses queries and computer applications to maintain control totals of base salaries City wide and balance salaries to payroll on a biweekly basis
- Analyzes original documents and determines necessary system entries
- Processes the City-wide payroll within the established deadlines
- Reviews and analyzes departmental payroll submissions for compliance with Memoranda of Understanding, laws, regulations, and City policy and makes adjustments where necessary
- Processes levies, judgments and injury compensation payments, and other transactions as needed in accordance with laws and regulations
- Reviews or reconciles biweekly distribution of salaries, compensation, deductions, and benefits including retirement
- Prepares or reviews biweekly, monthly, quarterly, and annual reports of payroll taxes and other payroll-related financial information using computer applications (electronic spreadsheets and word processing) and on-line financial system
- Reconciles employee deductions to the general ledger
- Researches and responds to inquiries regarding complex payroll issues
- Updates knowledge of City and other agency payroll requirements by reading technical literature

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Accounts payable and payroll processing tasks
- Accounting principles, practices, methods, and procedures
- Arithmetical calculations
- Automated on-line accounting and financial reporting systems
- Complex spreadsheets and database applications

SENIOR ACCOUNTING TECHNICIAN (continued)

- Principles and practices of supervision, leadership, training, and performance evaluation
- Research methods and statistical analysis
- Organizing paper and electronic records
- City contracts and policies, and state and federal laws and reporting requirements
- Report and letter writing
- Principles and practices of customer service that supports the establishment of strong interpersonal relationships
- Computer applications such as PeopleSoft, Microsoft Word, Access, Excel, and PowerPoint
- Correct English usage, including spelling, grammar, and punctuation
- Office safety practices, procedures and standards

Ability to:

- Effectively perform responsible, and complex accounting work with speed and accuracy
- Interpret, explain, and apply City Memoranda of Understanding, policies, laws, and rules
- Research, analyze and investigate financial and accounting records and suggest document work improvements
- Provide technical and functional supervision and training to staff
- Provide lead direction and review work of assigned staff
- Evaluate situations, identify problems, make logical decisions and follow through on resolution
- Effectively handle multiple priorities, organize workload and meet strict deadlines
- Establish and maintain effective working relationships with those contacted in the course of work
- Deal tactfully and courteously with others, including all levels of City staff, City vendors and the general public
- Perform excellent customer service;
- Work in a team-based environment and achieve common goals
- Follow and carry out complex oral and written instructions
- Communicate effectively, both orally and in writing
- Type from clear copy at a net rate of not less than 25 words per minute on a computer keyboard
- Walk or stand for extended periods of time
- Bend, stoop, reach, carry, crawl, climb, and lift as necessary to perform assigned duties

SUPERVISION RECEIVED

Works under the general supervision of the Accountant, Principal Accountant, or Accounting Services Division Manager as assigned.

SUPERVISION EXERCISED

Supervises Accounting Technicians I and II or other classifications as assigned.

OTHER REQUIREMENTS

- May be required to work unusual hours and weekends in the performance of their duties.
- Must be able to perform all of the essential functions of the job assignment.

AGENDA REPORT CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: **Request to Modify Job Specification and Establish Recruitment Type and Examination Weighting for Code Enforcement Officer**

SUMMARY: The Public Works Department will soon conduct a recruitment for the position of Code Enforcement Officer. The job specification for Code Enforcement Officer was last approved in October, 1987.

A job analysis was conducted to identify additions and changes to the job specification. Proposed changes to the Minimum Qualifications section include an Associate's Degree in City or Urban Planning, Business Administration, Construction Technology, Environmental Science, or closely related field and two (2) years of experience, one year of which must have been in a supervisory capacity. A Possible Substitutions section and a Desirable Qualifications section were added. The Licenses and/or Certificates section was updated to include a certification within the stormwater management field within twelve (12) months of appointment. A Distinguishing Characteristics section has been added to include support for the Community Development and Public Works Departments. The Typical Duties section was updated to include items such as issuing notices and citations and follow ups to ensure compliance. The Knowledge, Skills and Abilities section was updated to include items such as knowledge of City's municipal codes and zoning ordinance and ability to manage a caseload and resolve cases through the criminal or administrative process. The job specification has also been updated to reflect the new standard job description format.

It is recommended that the recruitment type for Code Enforcement Officer be Open/Promotional for promotional opportunities. It is also recommended that the exam weighting for this classification be 100% Oral examination. This will allow departments the opportunity to evaluate the candidates' skills through a comprehensive interview.

RECOMMENDATION: Staff recommends the Civil Service Commission approve the modified job specification for Code Enforcement Officer, and establish the recruitment type as Open/Promotional, with an examination weighting of 100% Oral examination.

PREPARED BY:



Christine Doan
HR Technician

APPROVED FOR CONTENT:



Julia Hill
Human Resources Assistant Director

APPROVED:



Elizabeth C. Brown
Director of Human Resources



**City of
Santa Clara**
The Center of What's Possible

Streets/Automotive Services

Memorandum

Date: August 24, 2017

To: Liz Brown, Director of Human Resources

From: Dave Staub, Deputy Director of Public Works

Subject: Request to Modify Job Specification and Recruitment Type for Code Enforcement Officer

The job specification for Code Enforcement Officer was last modified in 1987 and is currently an inactive class. The Public Works Department with Human Resources evaluated the current specifications and identified a need to update minimum qualifications, duties, knowledge, skills and abilities to give the Public Works Department a larger candidate pool of individuals from which to choose.

The 1987 version of the job description did not specify a recruitment type. The Public Works Department recommends the examination weight of 100% oral exam, and the recruitment type being Open/Promotional.

The Public Works Department is requesting that the Civil Service Commission approve the job specification and recruitment type changes for the Code Enforcement Officer.

A handwritten signature in cursive script that reads "Dave Staub".

Dave Staub
Deputy Director of Public Works

cc: Devon Toda, Compliance Manager



Date: August 21, 2017

To: Elizabeth Brown, Director of Human Resources

From: Andrew Crabtree, Director of Community Development
Sharon Goei, Building Official

Subject: Request to Modify Job Specification for Code Enforcement Officer

The job specification for Code Enforcement Officer was last revised in October of 1987.

The main purpose for revising the job specification is to add information and requirements related to building construction, inspection, and building codes for the Building Division, and to update information for zoning and land use investigations for the Planning Division. Minimum and desirable qualifications, including certifications, that are suitable for both Divisions were updated. Duties, knowledge, skills, and abilities were all updated to reflect current practices and technology.

This position supervises Code Enforcement Technicians. The examination weighting for the Code Enforcement Officer is proposed to be 100% oral examination.

CITY OF SANTA CLARA, CALIFORNIA
CODE ENFORCEMENT OFFICER
(330)

EDUCATION AND EXPERIENCE

Minimum Requirements:

- An Associate's Degree in City or Urban Planning, Business Administration, Construction Technology, Environmental Science, or closely related field; and
- Two (2) years of experience in public contact work involving zoning administrative investigation, building inspection or investigation, or stormwater pollution control, one year of which must have been in a supervisory capacity.

Possible Substitutions:

- One (1) year of additional related experience may be substituted for each year, up to two years of the required education.

Desirable Qualifications:

- A Bachelor's Degree in City or Urban Planning, Business Administration, Construction Technology, Environmental Science, Sustainability, or closely related field is desirable.
- A Code Enforcement Officer Certification by the California Association of Code Enforcement Officers (CACEO) is desirable.

LICENSE AND/OR CERTIFICATE

- Possession of a valid California driver's license is required at time of appointment and for the duration of employment.

For the Public Works Department:

- A recognized professional certification within the stormwater management field (QSP, QISP, CSM, CESSWI, CPESC, CPMSM, etc.) within twelve (12) months of appointment and for the duration of employment.

DISTINGUISHING CHARACTERISTICS

An incumbent in this position will conduct investigations related to storm water pollution, land use, buildings, zoning and related municipal codes and ordinances, to determine violations and gain compliance. The Code Enforcement Officer may be assigned to work in the Community Development Department or the Public Works Department.

TYPICAL DUTIES

Each position in this classification may not include all the duties listed below, nor do the examples cover all duties that may be performed.

CODE ENFORCEMENT OFFICER (continued)

- Conducts field surveys, inspections and investigations of land use, site and environmental conditions, or building construction
- Documents inspections, violations, actions and compliance
- Issues notices and citations and follows up to ensure compliance
- Answers questions and interprets ordinances, policies procedures and code enforcement concepts to assist applicants and general public
- Prepares record of deficiencies noted and compliance achieved
- Responds to complaints of zoning code violations or building code violations
- Prepares reports, maps, recommendations and other correspondence on code enforcement matters
- Coordinates actions with other City Departments, outside agencies and the public to identify and resolve code violation problems
- Establishes and maintain files and records related to citations and violations
- Supervises, trains and evaluates assigned staff
- Directs supporting activities of administrative and paraprofessional staff
- Prepares and presents public presentations and staff reports involving code enforcement
- Prepares and develops ordinances relating to code enforcement
- Represents the City in court actions related to enforcement
- Researches and prepares cases for prosecution; testifies at administrative hearings and/or in court; and assists with testimony of other staff witnesses

For the Community Development Department, Duties also include:

- Performs final inspections to determine compliance with planning related conditions of approval on projects
- Reviews and makes recommendations on development proposals and plans in light of compliance with City standards, impact upon adjacent properties and public facilities, and design and landscape compatibility
- Coordinates with the Police Department on the Abandoned Vehicle Abatement Program

KNOWLEDGE, SKILLS, AND ABILITIES

For all departments:

Knowledge of:

- City's municipal codes and zoning plans
- Field investigations and procedures
- Environmental and safety practices, procedures and standards
- Business report writing

For the Community Development Department:

- Planning requirements related to setbacks, buildings and sign heights
- Abandoned vehicle abatement program, citation procedures and code
- Building code provisions

For the Public Works Department:

- Storm drain and solid waste code provisions

CODE ENFORCEMENT OFFICER (continued)

Ability to:

- Respond to inquiries and complaints in a tactful and timely manner
- Exercise independent judgment and initiative with minimal supervision
- Communicate effectively, both orally and in writing
- Serve as liaison with planners, building inspectors, law enforcement aides, fire, police, attorneys and the general public on enforcement matters
- Prepare, maintain and update records, logs and reports
- Operate a mobile device/computer and applicable software such as a work order management system and Microsoft Office Suite
- Manage a caseload and resolve cases through the criminal or administrative process
- Effectively handle multiple priorities, organize workload and meet strict deadlines
- Work in a team-based environment and achieve common goals
- Walk or stand for extended periods of time
- Bend, stoop, reach, carry, climb and lift as necessary to perform assigned duties

For the Community Development Department:

- Interpret site development plans, landscape plans and building construction plans
- Conduct extensive research of City and County records

For the Public Works Department:

- Interpret state mandated stormwater pollution prevention plans

SUPERVISION RECEIVED

Works under the general supervision of the Compliance Manager, Planning Manager, Principal Planner, Inspection Manager, Senior Inspector, or other supervisor as assigned.

SUPERVISION EXERCISED

Supervises Code Enforcement Technicians and others as assigned.

OTHER REQUIREMENTS

- May be required to occasionally work evenings and weekends.
- Must be able to perform all of the essential functions of the job assignment.

CONFLICT OF INTEREST

Incumbents in this position are required to file a Conflict of Interest statement upon assuming office, annually, and upon leaving office, in accordance with City Manager Directive 100.

LEGEND:

Additions

Deletions

Approved October, 1987

Proposed September, 2017

CITY OF SANTA CLARA, CALIFORNIA

CODE ENFORCEMENT OFFICER

(330)

EDUCATION AND EXPERIENCE

Minimum Requirements: ~~A combination of education and experience substantially equivalent to a Bachelor's Degree in Urban Planning, Business Administration, Construction Technology or Pre-law and two years of zoning administrative investigation experience, one year of which must have been in a supervisory capacity.~~

- *An Associate's Degree in City or Urban Planning, Business Administration, Construction Technology, Environmental Science, or closely related field; and*
- *Two (2) years of experience in public contact work involving zoning administrative investigation, building inspection or investigation, or stormwater pollution control, one year of which must have been in a supervisory capacity.*

Possible Substitutions:

- *One (1) year of additional related experience may be substituted for each year, up to two years of the required education.*

Desirable Qualifications:

- *A Bachelor's Degree in City or Urban Planning, Business Administration, Construction Technology, Environmental Science, Sustainability, or closely related field is desirable.*
- *A Code Enforcement Officer Certification by the California Association of Code Enforcement Officers (CACEO) is desirable.*

LICENSE AND/OR CERTIFICATE

- **Possession of a valid California driver's license is required at time of appointment and for the duration of employment.**

For the Public Works Department:

- *A recognized professional certification within the stormwater management field (QSP, QISP, CSM, CESSWI, CPESC, CPMSM, etc.) within twelve (12) months of appointment and for the duration of employment.*

DISTINGUISHING CHARACTERISTICS

An incumbent in this position will conduct investigations related to storm water pollution, land use, buildings, zoning and related municipal codes and ordinances, to determine violations and gain compliance. The Code Enforcement Officer may be assigned to work in the Community Development Department or the Public Works Department.

CODE ENFORCEMENT OFFICER (continued)

TYPICAL TASKS/DUTIES

Each position in this classification may not include all the duties listed below, nor do the examples cover all duties that may be performed.

- ~~As assigned,~~ Conducts field surveys, inspections and investigations of land use, site and environmental conditions, or building construction
- Documents inspections, violations, actions and compliance
- Issues notices and citations and follows up to ensure compliance
- ~~a~~ Answers questions and interprets ordinances, policies procedures and code enforcement concepts to assist applicants and general public;
- ~~p~~ Prepares record of deficiencies noted and compliance achieved
- Responds to complaints of zoning code violations or building code violations
- Prepares reports, maps, and recommendations and other correspondence on code enforcement matters
- ~~Ce~~ Coordinates actions with other City ~~d~~ Departments, outside agencies and the public to identify and resolve code violation problems
- Establishes and maintain files and records related to citations and violations
- Supervises, trains and evaluates assigned staff
- ~~d~~ Directs supporting activities of clerical-administrative and sub-~~para~~professional staff
- Prepares and presents public presentations and staff reports involving code enforcement
- Prepares and develops ordinances relating to code enforcement
- Represents the City in court actions related to enforcement;
- Researches and prepares cases for prosecution; testifies at administrative hearings and/or in court; and assists with testimony of other staff witnesses

For the Community Development Department, Duties also include:

- ~~p~~ Performs final inspections to determine compliance with planning related conditions of approval on projects
- ~~r~~ Reviews and makes recommendations on development proposals and plans in light of compliance with City standards, impact upon adjacent properties and public facilities, and design and landscape compatibility;
- ~~supervises~~ Coordinates with the Police Department on the Abandoned Vehicle Abatement Program

KNOWLEDGE, SKILLS, & AND ABILITIES

For all departments:

Knowledge of: ~~Good presentation skills in both written and oral form essential.~~

- City's municipal codes and zoning plans
- Field investigations and procedures
- Environmental and safety practices, procedures and standards
- Business report writing;

For the Community Development Department:

CODE ENFORCEMENT OFFICER (continued)

- *Planning requirements related to setbacks, buildings and sign heights*
- *Abandoned vehicle abatement program, citation procedures and code*
- *Building code provisions*

~~Familiarity with planning requirements related to setbacks, buildings and sign heights~~

For the Public Works Department:

- *Storm drain and solid waste code provisions*

Ability to:

- *Respond to inquiries and complaints in a tactful and timely manner*
- ~~work with minimal supervision~~ *Exercise independent judgment and initiative with minimal supervision*
- *Communicate effectively, both orally and in writing*
- *Serve as liaison with planners, building inspectors, law enforcement aides, fire, police, attorneys and the general public on enforcement matters*

~~Orientation toward conciliatory problem solving desirable.~~

~~Good presentation skills in both written and oral form essential.~~

- ~~, effective knowledge of City's municipal codes, zoning ordinance, abandoned vehicle abatement program and citation procedures, good ability to follow established priority work program, excellent organization and problem solving skills.~~
- *Prepare, maintain and update records, logs and reports*
- *Operate a mobile device/computer and applicable software such as a work order management system and Microsoft Office Suite*
- *Manage a caseload and resolve cases through the criminal or administrative process*
- *Effectively handle multiple priorities, organize workload and meet strict deadlines*
- *Work in a team-based environment and achieve common goals*
- *Walk or stand for extended periods of time*
- *Bend, stoop, reach, carry, climb and lift as necessary to perform assigned duties*

For the Community Development Department:

- ~~Ability to interpret site development plans, landscape plans and building construction plans~~
- *Conduct extensive research of City and County records* ~~identify color and materials normally used in construction.~~

For the Public Works Department:

- *Interpret state mandated stormwater pollution prevention plans*

SUPERVISION RECEIVED

Works under the general supervision of the *Compliance Manager, Planning Manager, Principal Planner, Inspection Manager, Senior Inspector, City Planner* or other supervisor as assigned.

SUPERVISION EXERCISED

Supervises *Code Enforcement Technicians* ~~law enforcement aides~~ and others as assigned.

OTHER REQUIREMENTS

CODE ENFORCEMENT OFFICER (continued)

- *May be required to occasionally work evenings and weekends.*
- *Must be able to perform all of the essential functions of the job assignment.*

CONFLICT OF INTEREST

Incumbents in this position are required to file a Conflict of Interest statement upon assuming office, annually, and upon leaving office, in accordance with City Manager Directive 100.

AGENDA REPORT
CITY OF SANTA CLARA CIVIL SERVICE COMMISSION

DATE: September 11, 2017

TO: Civil Service Commission

FROM: Director of Human Resources

SUBJECT: Request to Modify Job Specification and Exam Weighting for Account Clerk III

SUMMARY: The Electric Department will soon conduct a recruitment for the position of Account Clerk III. The job specification for Account Clerk III was last approved in June 1999. A job analysis was recently conducted to identify updates to the job specification.

The job analysis revealed several additions needed to the typical tasks section of the job specification. Some additions include; maintains journals and ledgers of financial transactions, including revenue and expenditure accounts and maintains monthly budget status. Deletions were also made to the typical tasks section to better reflect the current position. Some deletions include; schedules commercial utility accounts and deleting language that is not current to today's technology such as machine processing. The Knowledge, Skills and Abilities section was also updated to delete the ability to type from clear copy at a speed of not less than 25 words per minute. At the Account Clerk III level, this ability has already been achieved and would alleviate the need for a performance examination which is the submittal of a typing certificate.

The department submitted a memo regarding the exam weighting and would like to modify the exam weighting from (Qualifying Performance/100%Written) to 100% Oral. The typing certificate is no longer needed which was the performance exam and an Oral Examination is a better exam tool at the Account Clerk III level. There are no recommended changes to the recruitment type (Open/Promotional).

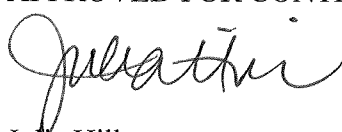
RECOMMENDATION: Staff recommends the Civil Service Commission approve the modified job specification and the exam weighting change for Account Clerk III.

PREPARED BY:



Vicki Sapp
Sr. HR Technician

APPROVED FOR CONTENT:



Julia Hill
Human Resources Assistant Director

APPROVED:



Elizabeth C. Brown
Director of Human Resources



**City of
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INTEROFFICE MEMORANDUM

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SEP. 06 2017

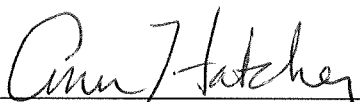
HUMAN RESOURCES DEPARTMENT
CITY OF SANTA CLARA

Date: September 6, 2017
To: Director of Human Resources
From: Director of Electric Utility
Subject: Request to Approve Revised Examination Weighting for Account Clerk III

The Electric Department will open recruitment for an Account Clerk III position soon. The exam weighting was set in 1999 to 100% written/qualifying performance. However, previous experience as an account clerk or accountant is a minimum requirement for the higher level position and the previous experience should suffice to show qualifying accounting skills. However, at the level of Account Clerk III, there are other soft skills and potential supervisory requirements of the position that will not be obvious in a written exam.

As such, the Electric Department would recommend that the exam weighting be set at 100% oral for the Account Clerk III position.

Thank you for your assistance. If you have any questions regarding this request, please contact Ann Hatcher or Voula Brown.


for John C. Roukema
Director of Electric Utility

CITY OF SANTA CLARA, CALIFORNIA
ACCOUNT CLERK III
(220)

EDUCATION AND EXPERIENCE

Minimum Qualifications

- Associates Degree in Accounting, Business Administration, or a related field and
- Three (3) years of progressively responsible accounting experience or
- Graduation from High School or a GED and five (5) years of increasingly responsible accounting or financial record keeping experience
- Experience in the areas of payroll, industrial utility billing, accounts payable, inventory control, purchasing or revenue collection is required.

Possible Substitutions

- One year of additional experience may be substituted for 30 semester units of the required education

Desirable Qualification

- Municipal financial record keeping experience is desirable

LICENSE

Possession of an appropriate, valid Class C California driver's license is required at the time of appointment and for the duration of employment.

DISTINGUISHING CHARACTERISTICS

This is a sub-professional position in the classified service and is distinguished from the next lower level of Account Clerk II in that positions at this level require the frequent use of a high degree of independent judgment and interpretative ability related to a technical knowledge of some special areas of accounting or financial record keeping. Incumbents in this class use computers on a daily basis in accomplishing their work. Incumbents in this class are expected to supervise and provide technical guidance to accounting and other personnel assigned to their work area.

TYPICAL TASKS

Duties may include, but are not limited to, the following:

Under general supervision:

- Responsible for the preparation and processing of accounts payable and accounts receivable; schedules, assigns, and checks the work of clerical personnel
- Verifies, approves, and screens fiscal documents such as warrants, requisitions, purchase orders, and invoices
- Calculates and records interest charges, sales tax, and trade charges; prepares progress payments on City contracts; prepares Tax Returns

ACCOUNT CLERK III (continued)

- Answers inquiries from the general public and city vendors
- Responsible for the preparation and processing of the billing and maintenance of all City accounts including the settlement of delinquent accounts
- Processes bankruptcy claims of industrial customers and maintains applicable files
- Makes necessary corrections on accounts when required
- Answers questions pertaining to utility billing procedures and utility rate schedules and resolves high bill complaints
- Prepares analysis breakdown of billing computations indicating for commercial and industrial consumers how bills are computed
- Prepares final notices for mailing to delinquent industrial customers
- Determines deposit amount and informs customers accordingly
- Schedules, assigns and checks the work of other personnel involved in the receipting and balancing of cash
- Oversees the preparation of bank deposits, collection of return checks, and inputs data into the computer
- Traces payments received without remittance advice to determine account to be credited
- Prepares monthly activity report
- Types forms, letters and other correspondence
- Interfaces with public concerning the administration of delinquent accounts
- Deals tactfully and courteously with customer complaints or questions
- Responsible for the preparation of City payroll
- Verifies salary claims and computes and proves payroll deductions
- Audits departmental payroll reports and prepares payroll transaction notices
- Makes necessary payroll changes to process judgments, tax levies and injury compensation payments
- Reconciles all bi-weekly distribution of salaries, compensation and retirement
- Maintains journal and ledgers of financial transactions, including revenue and expenditure accounts
- Maintains monthly budget status
- Prepares monthly, quarterly and annual and special reports
- Updates knowledge of City and other agency payroll requirements by reading technical literature
- Analyzes and implements contract provisions relating to payroll processing and
- Performs other related duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Methods, practices, and terminology used in general accounting and financial record keeping work including knowledge of accounts payable, accounts receivable, industrial utility billing, and/ or payroll
- Office safety practices, procedures and standards

Ability to:

- Post financial data and make accounting computations rapidly and accurately
- Prepare and verify financial statements, payroll transactions, invoices, and reports
- Interpret and explain utility rate schedules and computations, payroll deductions, and

ACCOUNT CLERK III (continued)

- other financial information
- Supervise and train subordinate personnel performing a variety of responsible accounting and office work
- Understand customer questions and complaints and to make satisfactory explanations
- Establish and maintain effective working conditions with supervisors, other employees and the public
- Use computer and applications such as spreadsheets, word processing, databases, e-mail, internet and other related applications
- Operate adding machine or calculator by touch
- Communicate effectively, both orally and in writing
- Establish and maintain effective working conditions with supervisor, other employees and the public
- Work in a team-based environment and achieve common goals
- Handle multiple priorities, organize workload and meet strict deadlines
- Bend, stoop, reach, carry, climb and lift as necessary to perform assigned duties

SUPERVISION RECEIVED

Works under the general supervision of the department head or other unclassified personnel as assigned.

SUPERVISION EXERCISED

May assist in the training or supervision of subordinate personnel as assigned.

OTHER REQUIREMENTS

Must be able to perform all of the essential functions of the job assignment.

CITY OF SANTA CLARA, CALIFORNIA
ACCOUNT CLERK III
(220)

EDUCATION AND EXPERIENCE

Minimum Qualifications

- *Associates Degree in Accounting, Business Administration, or a related field and*
- *Three (3) years of progressively responsible accounting experience or*
- *Graduation from High School or a GED and five (5) years of increasingly responsible accounting or financial record keeping experience*
- *Experience in the areas of payroll, industrial utility billing, accounts payable, inventory control, purchasing or revenue collection is required.*

Possible Substitutions

- *One year of additional experience may be substituted for 30 semester units of the required education*

Desirable Qualification

- *Municipal financial record keeping experience is desirable*

~~Combination of education and experience substantially equivalent to completion of an Associate of Arts degree in Accounting, Business Administration, or a related field and three (3) years of progressively responsible accounting experience; or graduation from high school or its equivalent and five (5) years of increasingly responsible accounting or financial record keeping experience. Additional qualifying experience may be substituted on a basis of one year equals 30 semester units of the required education. Personal computer experience working with spreadsheet, database, and online accounting applications in a Windows based environment is required. Previous experience in the areas of payroll, industrial utility billing, accounts payable, inventory control, purchasing, or revenue collection is required. Municipal financial record keeping experience is preferred.~~

LICENSE

Possession of an appropriate, valid Class C California driver's license is required at the time of appointment and for the duration of employment.

DISTINGUISHING CHARACTERISTICS

This is a sub-professional position in the classified service and is distinguished from the next lower level of Account Clerk II in that positions at this level require the frequent use of a high degree of independent judgment and interpretative ability related to a technical knowledge of some special areas of accounting or financial record keeping. Incumbents in this class use computers on a daily basis in accomplishing their work. Incumbents in this class are expected to supervise and provide technical guidance to accounting and other personnel assigned to their work area.

ACCOUNT CLERK III (continued)

TYPICAL TASKS

~~May include any or all of the following.~~ *Duties may include, but are not limited to, the following:*

Under general supervision:

- Responsible for the preparation and processing of accounts payable and accounts receivable; schedules, assigns, and checks the work of clerical personnel;
- ~~V~~-verifies, approves, and screens fiscal documents such as warrants, requisitions, purchase orders, and invoices;
- ~~C~~-calculates and records interest charges, sales tax, and trade charges; prepares progress payments on City contracts; prepares Tax Returns;
- ~~consults with City Attorney on litigation;~~
- ~~A~~-answers inquiries from the general public and city vendors;
- ~~using on-line mainframe accounts payable system, initiates weekly vendor check printing, registers, and Bills & Claims reports for submission in City Council agenda package.~~
- ~~Responsible for the preparation and processing of the billing and maintenance of all City accounts including the settlement of delinquent accounts;~~
- ~~schedules commercial utility accounts;~~
- ~~P~~-processes bankruptcy claims of industrial customers and maintains applicable files;
- ~~M~~-makes necessary corrections on accounts when required;
- ~~A~~-answers questions pertaining to utility billing procedures and utility rate schedules and resolves high bill complaints;
- ~~P~~-prepares analysis breakdown of billing computations indicating for commercial and industrial consumers how bills are computed;
- ~~P~~-prepares final notices for mailing to delinquent industrial customers;
- ~~D~~-determines deposit amount and informs customers accordingly.
- ~~S~~-chedules, assigns and checks the work of other personnel involved in the receipting and balancing of cash;
- ~~O~~-verseees the preparation of bank deposits, collection of return checks, and inputs data into the computer;
- ~~T~~-traces payments received without remittance advice to determine account to be credited;
- ~~P~~-prepares monthly activity report;
- ~~T~~-types forms, letters and other correspondence;
- ~~I~~-interfaces with public concerning the administration of delinquent accounts;
- ~~D~~-deals tactfully and courteously with customer complaints or questions.
- ~~Responsible for the preparation of City payroll;~~
- ~~V~~-verifies salary claims and computes and proves payroll deductions;
- ~~A~~-audits departmental payroll reports and prepares payroll transaction notices for machine processing;
- ~~M~~-makes necessary payroll changes to process judgments, tax levies and injury compensation payments;
- ~~R~~-reconciles all bi-weekly distribution of salaries, compensation and retirement;
- *Maintains journal and ledgers of financial transactions, including revenue and expenditure accounts*
- *Maintains monthly budget status*
- ~~P~~-prepares monthly, quarterly and annual and special reports from payroll records;
- ~~U~~-updates knowledge of City and other agency payroll requirements by reading technical

ACCOUNT CLERK III (continued)

literature;

- *A*-analyzes and implements contract provisions relating to payroll processing; and
- *P*erforms other related duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- ~~*M*~~-methods, practices, and terminology used in general accounting and financial record keeping work including knowledge of accounts payable, accounts receivable, industrial utility billing, and/ or payroll-
- *Office safety practices, procedures and standards* ~~Ability to post financial data and make accounting~~

Ability to:

- *Post financial data and make accounting computations rapidly and accurately*
- ~~computations rapidly and accurately;~~
- ~~*P*~~-prepare and verify financial statements, payroll transactions, invoices, and reports;
- ~~*I*~~-interpret and explain utility rate schedules and computations, payroll deductions, and other financial information;
- ~~*S*~~-supervise and train subordinate personnel performing a variety of responsible accounting and office work;
- ~~*U*~~-understand customer questions and complaints and to make satisfactory explanations;
- ~~*E*~~-establish and maintain effective working conditions with supervisors, other employees and the public; ~~and~~
- *Use computer and applications such as spreadsheets, word processing, databases, e-mail, internet and other related applications*
- ~~type from clear copy at a speed of not less than 25 words per minute. Ability to~~
- ~~*O*~~-operate adding machine or calculator by touch ~~is desirable.~~
- *Communicate effectively, both orally and in writing*
- *Establish and maintain effective working conditions with supervisor, other employees and the public*
- *Work in a team-based environment and achieve common goals*
- *Handle multiple priorities, organize workload and meet strict deadlines*
- *Bend, stoop, reach, carry, climb and lift as necessary to perform assigned duties*

SUPERVISION RECEIVED

Works under the general supervision of the department head or other unclassified personnel as assigned.

SUPERVISION EXERCISED

May assist in the training or supervision of subordinate personnel as assigned.

OTHER REQUIREMENTS

Must be able to perform all of the essential functions of the job assignment.