



COUNTY OF EL DORADO

P. Morello **Draft Classification Report**

June 2019

Submitted by:

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Background/Introduction

By way of background, the County of El Dorado (County) retained Koff & Associates (K&A) to conduct a County-wide classification study to ensure current classification specifications are consistent with industry standards and that employees are in the correct classifications based on the duties and responsibilities assigned. K&A recommended reclassifying Ms. Patricia Morello's position to a newly created Administrative Assistant I/II classification. Ms. Morello submitted a feedback form in April 2017 and October 2017 indicating that the job description contained inaccurate information and she did not agree with the allocation recommendation. Her specific reason was she "disagreed with the classification recommendation because majority of the duties for her position can be found on the current and proposed Administrative Technician specs."

In 2018, the Department of Human Resources (HR) conducted a limited classification study of a single position assigned to the Executive Assistant classification (encumbered by Ms. Morello) within the Veterans Department (Department). During this time period, Ms. Morello reported to Mr. Bill Schultz, Recorder-Clerk-Registrar and Veterans Affairs Director. Ms. Morello also worked closely with Lance Poinsett, Veterans Services Officer (VSO), regarding day-to-day activities of the Department.

After review and analysis of the duties and responsibilities assigned to the position encumbered by Ms. Morello, HR determined that (i) the current classification to which the position is assigned, Executive Assistant, is not reflective of the work performed because Ms. Morello spends a relatively small percentage of time performing secretarial duties in support of the Department Director; and (ii) the current preponderant duties are to provide and perform a variety of administrative and office support duties that are not predominantly paraprofessional or technical in nature. Furthermore, Ms. Morello's scope and complexity of duties, in addition to the decision making related to such, are not consistent with that of a paraprofessional classification. Given the staffing and workload challenges within the Department, there could certainly be a need for an Administrative Technician classification; however, Ms. Morello is not currently performing duties and responsibilities consistent with the Administrative Technician classification. Overall, HR agreed with K&A's recommendation to reclassify the position to an Administrative Assistant II (Confidential).

This recommendation was placed on hold due to organizational changes with the Veterans Department. Via a Board action the Veterans Department was dissolved and moved to the Health and Human Services Agency (HHSA) as a division. Given such, the decision was made to leave the position classified as-is to allow implementation of the organization change and a re-structure of the administrative and operational support provided to Veteran Affairs.

It's been just short of one year since the organizational changes; therefore, HHSA requested a review of the position to determine the appropriate classification.

Classification Framework

The classification analysis for this study relies upon sound principles of job evaluation and classification. The approach identifies classifications that reflect distinct differences in levels and types of work as determined through the use of established allocation factors and classification concepts. This section of the report presents the conceptual framework for the methods used by HR in analyzing a classification recommendation for this study position.

General Guideline and Definitions

Point in Time Analysis

A classification study primarily captures the essential nature of positions at a single point in time. Therefore, recommendations cannot be based upon all possible future changes, particularly in a rapidly changing environment where organizational needs, technologies, and skill requirements are continuously evolving.

Whole-Job Analysis

For purposes of this study, HR used a whole-job analysis approach. This methodology analyzes the job as a whole, rather than by individual factors, by evaluating the core duties and responsibilities, the nature and level of work performed, and the minimum qualifications which are required to perform the work. This approach compares jobs with one another on the basis of an overall evaluation of difficulty or performance. The entire position, including the skills required, the decision-making authority, the scope, the magnitude of work, and the accountability for results, is compared as a whole to other positions.

Preponderant Duties

Classification studies often find that positions are assigned a wide range of duties and that incumbents have various levels of responsibility at any one time. Therefore, the positions must be analyzed based on their preponderant duties. Preponderance is a measure of importance; the most preponderant duties of a position are those that support the primary purpose of the position. Sometimes the most time-consuming duties of a position are preponderant; however, consideration must sometimes be given to the responsibility and complexity of certain duties that do not occupy the majority of the incumbent's time. Overall, the determination of preponderance is a judgment call based on a consistent set of factors.

Level and Not Volume of Work

Position classification is a reflection of the level of work performed by an employee; and thus, it is generally independent of volume. For example, if one employee processes double the work of another, yet the percentages of time spent on those tasks and other duties are comparable, a single classification should be appropriate for both positions. In fact, study questionnaires do not ask for, and HR would not consider, the relative productivity of employees when evaluating positions. Likewise, classifications are not distinguished by the amount of time spent by incumbents on tasks or the volume of work assigned to positions since problems of excessive workload are properly solved by redistributing work or adding employees, and not by creating new classifications.

Determining Classification Breadth and Depth

Classification plans generally establish classifications based on a determination of "sufficient similarity". However, within an individual organization, sufficient similarity can be interpreted to coincide with the goals and philosophy of the organization. For example, a broad interpretation recognizes positions that share a core set of duties, but accepts substantial variation between positions, resulting in varied assignments within each classification. In contrast, a narrow interpretation might create separate narrow classifications to address such variations.

Allocation Factors

Allocation factors are standards that are used to measure job requirements of individual positions. These factors can be compared in order to measure the similarities and differences among positions. The common allocation factors used to evaluate this study position included:

- Decision Making - Consists of [a] the decision-making responsibility and degree of independence or latitude that is inherent in the position, and [b] the impact of the decisions.
- Scope and Complexity - Defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.
- Contact with Others Required by the Job - Measures [a] the types of contacts, and [b] the purpose of the contacts.
- Supervision Received and Exercised - Describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position.
- Knowledge, Skills, and Abilities - Defines the knowledge, skills, and abilities necessary to perform assigned responsibilities.

Classification Analysis

Ms. Morello has been with the County and in her current position for 10+ years. She is currently classified as an Executive Assistant, in which she performs technical and administrative office duties in support of Veterans Affairs. Specific duties presented in the following table are taken from the Position Description Questionnaire (PDQ) completed by Ms. Morello and follow-up information received by HR in November 2017. In addition, in May and June 2019, additional duties and percentages of time were presented to HR consistent with recent organizational changes.

ESSENTIAL JOB FUNCTIONS – Patricia Morello			
Task #	Tasks	Percentage of Time - 2017	Percentage of Time - 2019
1	Greet walk-in clients and document all incoming correspondence (mail, email, website, and telephone), date stamp documents, and input into database; distribute to staff and forward all veteran information to social media sites.	20%	10%
2	Safety coordinator - attend all quarterly safety meetings, monitor the Department and veteran memorial building site for incident reports and document and forward all work order and repairs to facilities.	5%	N/A
3	Receive in-person/telephone requests for appointments with staff; schedule and assign work details.	20%	5%

ESSENTIAL JOB FUNCTIONS – Patricia Morello			
Task #	Tasks	Percentage of Time - 2017	Percentage of Time - 2019
4	For federal work-study and extra help hires - train, schedule, and assign work details; evaluate staff and process terminations.	5%	N/A
5	Participate in the development of policies and procedures; monitor office activities to ensure compliance with established policies and procedures; and make recommendations for changes and improvements to existing standards and procedures. Create and update all Department office support documents and forms; implement best practices and industry standards for work flow support of the division and troubleshoots issues for the VSO and upper management, which involves collaborating on projects, events, and following up on internal processes.	10%	28%
6	Veterans Affairs Commission, TOT Committee - process agenda; take meeting minutes; process, copy, post, mail, and upload; arrange meeting locations; communicate and coordinate with chair; and process monthly mileage reimbursements. - Initiate all BOS items for the division and Veterans Affairs Commission.	10%	10%
7	County budget process - research, upload, calculate support (annual and semi-annual) document and input into BPREP.	10%	4%
8	Department ADPOCS/FAMOS processes. Process all account payables (claim payments, P-Card reconciliation, and journal entries) and verify all receivables (PO's, DPO's, REQ's) Federal SEFA reports.	10%	3%
9	*Cal-Vert college fee waivers - receive and review for completeness, verify forms, input into the databases, print letters for signature, then copy, scan, fax, or mail. - Research, interpret, and process veterans' benefits correspondence; veterans' specific benefits forms, and provide application assistance and handle basic intake processing for College Fee Waiver, Department of Motor Vehicles – Identification applications, and Medi-Cal cost avoidance claims.	3%	20%
10	Process payroll - input and perform Department processes for Department staff. For work-study and extra help staff, handle the federal payroll process.	5%	N/A
**	Outreach - coordinate all outreach activities with state, local, and federal veteran services organizations and develop the divisions	N/A	15%

ESSENTIAL JOB FUNCTIONS – Patricia Morello			
Task #	Tasks	Percentage of Time - 2017	Percentage of Time - 2019
	outreach budget; primary interface with multiple communities that provide support to veterans; extract and analyze data to ensure accurate metrics reporting and recommendation for revised to the outreach plan; prepare program budget justifications and function as the primary liaison with various groups.		
**	Quality Control and Tracking – Monitor the veterans system to ensure Veteran Services Representatives (VSR) are completing and processing paperwork timely. Check to ensure supporting documentation is attached (e.g., bank statements); if not, remind staff to include the appropriate attachments. When errors are discovered, make the necessary corrections. While conducting quality control and assurance activities, identify training needs or issues of non-compliance and report such to the VSO. - Coordinate the required elements for monthly, quarterly, and semi-annually reporting of metrics.	N/A	5%

* Although not required for the job, Ms. Morello received a VSR Accreditation, which allows her to provide additional operational support to Veterans Affairs.

** Duties noted above were not in the PDQ completed by Ms. Morello; however, the memo provided on May 23, 2019, includes these additional duties.

In addition to the organizational changes referenced in the Background/Introduction section, the division also received an additional Fiscal Assistant allocation. It appears that the allocation is actually assigned to the Administrative and Finance division within HHSA; however, it’s my understanding that the position was created for the sole purpose to provide financial and clerical administrative support to Veterans Affairs. This transition is important, as Ms. Morello is the only administrative support position within Veterans Affairs and could be assigned some additional duties to support the group.

I wasn’t able to obtain clarification regarding how this Fiscal Assistant position is being used. Based on the duties and percentages above, Ms. Morello’s performance of fiscal/clerical duties has decreased, but she is still involved in some aspects of such duties (which could be performed by the Fiscal Assistant).

Supervisor/Manager Comments

A meeting was conducted with Ms. Morello’s immediate supervisor, Mr. Poinsett, as well as Patty Moley, Assistant Director, to discuss the changes in duties and responsibilities assigned to Ms. Morello. Both agree with the evolution of Ms. Morello’s duties and the subsequent percentages of time. In addition, both confirmed that at the conclusion of the classification analysis that they plan to immediately assign the additional duties listed below to Ms. Morello’s position:

- Creation and maintenance of a Dashboard, so at-a-glance data is easily accessible (via Google site, similar to HHSA PIT Stop).
- Proactive, internal quality assurance, prior to work leaving the office for the USVA, or CalVet.
 - Currently, Ms. Morello's QA and QC activities have been re-activated.
- Identification of technical error trends and submitting data charts and/or narrative reports to the VA Sup and HHSA managers, targeting specific training needs, and preparing Hot Topic and regulatory change training materials.
- Creation and maintenance of a VA specific intranet site, with up-to-date links for all governing rules and regulations that directs the work of the VSRs, to include policies and procedures for the office, work flow charts, and desk guides for the staff.
- Creation of a critical elements claim check list, for each significant programmatic activity, by funded workload unit, as a VSR checklist tool, so staff has a way to assure work is completed before submitting to USVA.
- Development and tracking tool for all MC5s and CW5s between HHSA Eligibility and the VSO office, to include tickler for any hitting the 7 day mark.

Below is a summary of classification specifications analyzed within the scope of this classification analysis:

Classification specification Content - Proposed Administrative Assistant I/II (Appendix A)

This classification is defined as one which “under general supervision, performs a variety of administrative, secretarial, and office support duties of considerable complexity, requiring thorough knowledge of the assigned department, division, or program, its procedures, and operational details; provides administrative support to various departmental staff; composes and prepares correspondence using considerable judgment in content and style; performs skilled word processing, data entry and organization, telephone and counter reception, processing of invoices, recordkeeping, statistical and technical report preparation, and filing. Incumbents possess a comprehensive, authoritative understanding of all departmental functions and professional activities, and provide support to professional-level staff in the completion of their duties, in addition to completing complex clerical assignments.”

Classification specification Content - Proposed Administrative Technician (Appendix B)

This classification is defined as one which “under general supervision, performs a variety of responsible paraprofessional, technical, and administrative support duties requiring the application of procedural, program, and compliance knowledge in support of a department, division, or program; assumes ongoing, technical responsibilities specific to area of assignment; coordinates assigned programs, projects, and services with other departments, divisions, and outside agencies; performs research and routine analysis on a wide variety of special projects requiring the interpretation and application of and ensuring compliance with policies, procedures, requirements, and regulations and may involve frequent contact with staff and the public. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work department or division.”

The “Examples of Typical Duties” section within the job description further articulates the associated duties and responsibilities assigned to this classification.

Findings

After review and analysis of the duties and responsibilities assigned to the position encumbered by Ms. Morello, HR determined that the current classification to which the position is assigned, Executive Assistant, is not reflective of the work performed because Ms. Morello spends a relatively small percentage of time performing secretarial duties and, more importantly, Veteran Affairs is no longer a department with an assigned department director. Therefore, given the duties and responsibilities, and change in the organizational structure, the classification of Executive Assistant and confidential designation are no longer appropriate for this position and should be removed during the same time this position is reclassified.

The primary purpose of this position is to provide a variety of administrative clerical and paraprofessional support duties to the Veterans Affairs Division. Given organizational structure changes and changes to the position, the preponderant duties assigned (researching, interpreting, and ensuring compliance with federal, state and County laws and regulations; evaluating procedures and processes and making recommendations for modification and training; performance of operational assignments and projects that allow VSR and the VSO to focus on higher level tasks; and conducting quality control review and analysis of certain operational processes) are technical in nature. It's important to note that many of the paraprofessional duties and responsibilities assigned and performed by Ms. Morello is due to her State accreditation, which is the same accreditation that is required in the VSR classification. Having this accreditation allows Ms. Morello to provide technical operational support (as noted above) and an operational knowledge and understanding of the process, laws, and regulations that the future candidate may not have. Therefore, irrespective of the classification title, when this position becomes vacant, if the next incumbent doesn't have the State accreditation, many of the duties and training noted above shall immediately be reassigned. This reassignment of duties will have a direct impact on the appropriate classification for this position.

I considered the possibility of reclassifying, Ms. Morello's position to a VSR; however, doing such would not account for the administrative support performed by Ms. Morello, which is absolutely critical for the success of Veterans Affairs. In addition, some of the technical support provided by Ms. Morello is administrative in nature, such as her role coordinating outreach activities. Reclassifying the position to a VSR with the same administrative duties would result in the VSR position being misclassified.

Another important factor in my analysis is the future duties that will be added to the position once the Board adopts the recommended reclassification. Many of these duties are not only technical in nature, but require the application of procedural and program knowledge of veterans' affairs. Classification decisions should not be solely based on the possibility of assigning future duties; however, absent these duties, there is still a strong case to support a reclassification of this position.

In reviewing and analyzing the job descriptions for the two classifications noted, the data provided by the incumbent and the supervisor against the allocation factors noted on page 3, the current future duties and responsibilities, HR finds that the Administrative Technician classification is most appropriate.

Appendix A

Administrative Assistant I/II Classification Specification



ADMINISTRATIVE ASSISTANT I/II

DEFINITION

Under immediate or general supervision, performs a variety of administrative, secretarial, and office support duties of considerable complexity, requiring thorough knowledge of the assigned department, division, or program, its procedures, and operational details; provides administrative support to various departmental staff; composes and prepares correspondence using considerable judgment in content and style; performs skilled word processing, data entry and organization, telephone and counter reception, processing of invoices, recordkeeping, statistical and technical report preparation, and filing; provides information to the public and County staff; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate or general supervision from assigned supervisory or management personnel. Exercises no direct supervision of staff.

CLASS CHARACTERISTICS

Administrative Assistant I: This is the entry-level classification in the Administrative Assistant series. Initially under close supervision, incumbents learn and perform routine administrative, secretarial, or clerical duties. As experience is gained, assignments become more varied, complex, and difficult; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the II level, but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

Administrative Assistant II: This is the fully qualified journey-level classification in the Administrative Assistant series. Incumbents at this level possess a comprehensive, authoritative understanding of all departmental functions and professional activities, and provide support to professional-level staff in the completion of their duties, in addition to completing complex clerical assignments including taking and transcribing meeting minutes and assisting in department-related projects and programs. Positions at this level are distinguished from the I-level by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

Positions in the Administrative Assistant class series are flexibly staffed and positions at the II-level are normally filled by advancement from the I-level, after gaining the knowledge, skill, and experience which meet the qualifications for and after demonstrating the ability to perform the work of the higher-level class.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

- Provides administrative support to an assigned supervisor or manager in the daily management of operations.

- Prepares, types, and/or processes various documents requiring professional knowledge of the department, division, or program functions, which may include, but are not limited to, permits, licenses, applications, vouchers, claims, meeting agendas and minutes, correspondence, periodic reports, contracts, agreements, legal/official documents, bid documents, etc.
- Schedules and/or coordinates meetings, seminars, conferences, and training sessions for department staff; acts as meeting secretary, including preparing agendas and informational packets, setting up meeting and training rooms, and taking and transcribing minutes for assigned meeting, boards, and commissions; prepares complex departmental agenda items and packets for Board of Supervisor or other committee, commission meetings.
- Composes, types, edits, and proofreads a variety of complex documents, including forms, memos, statistical and analytical reports, organization charts, program plans, and correspondence for department staff from rough draft, dictation equipment, handwritten copy, verbal instructions, or from other material using a computer; inputs and retrieves data and text using a computer terminal; checks draft documents for punctuation, spelling, and grammar; makes or suggests corrections to drafts.
- Maintains accurate and detailed records, verifies accuracy of information, researches discrepancies, and records information.
- Verifies and reviews forms and reports for completeness and conformance with established regulations and procedures; applies departmental and program policies and procedures in determining completeness of applications, records, and files.
- Performs various accounting/bookkeeping work, which includes verifying or computing financial data, preparing billing invoices, processing accounts payable/receivable, preparing financial reports and statements, maintaining and balancing accounts, preparing bank deposits, processing payroll, etc.
- May perform various duties associated with personnel administration, which may include establishing and maintaining confidential employee records, coordinating required pre-employment testing, conducting new employee orientations, and processing related paperwork.
- Prepares, copies, collates, and distributes a variety of documents, including agendas, bid packages, contracts, informational packets, and specifications; ensures proper filing of copies in departmental or central files.
- Organizes, coordinates, maintains, and updates departmental record systems; enters and updates information with departmental activity, files, and report summaries; retrieves information from systems as required.
- Gathers, assembles, updates, and distributes a variety of department-specific information, documents, forms, records, and data as requested; researches records within areas of responsibility to prepare and provide follow-up information to customer and staff inquiries.
- Communicates with officials and staff of other departments and agencies to obtain and relay information and to coordinate activities.
- Receives and responds to inquiries, in oral or written form, from the public or other agencies concerning department/division operations.
- Performs other clerical/administrative work as required, which may include but is not limited to copying documents, filing/retrieving files, reviewing and processing mail, faxing information, answering the telephone, scheduling appointments and meetings, maintaining calendars, maintaining inventory of supplies and materials, etc.
- Prepares and distributes outgoing mail; receives shipments; compares packing slips with received goods; matches invoices with packing slips to ensure accuracy.
- Organizes, coordinates, and attends various meetings and training as required or appropriate.
- Completes special projects as assigned.
- Performs related duties as assigned.

QUALIFICATIONS

Some knowledge and abilities may be performed by positions at the entry (I) level in a learning capacity.

Knowledge of:

- Business administrative policies and procedures.
- County and department programs, goals, and policies and procedures of the assigned department/division.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Principles and practices of data collection and report generation.
- Methods of preparing and processing various records, reports, forms, and other documents particular to assigned department or program.
- Recordkeeping, report preparation, and filing systems and methods.
- Financial recordkeeping and budget preparation.
- Business arithmetic, including percentages and decimals.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Perform difficult and complex administrative statistical and functional work involving the use of considerable independent judgment.
- Maintain confidentiality of information received.
- Understand scope of authority in making independent decisions.
- Gather and compile department/division-specific information from a variety of sources.
- Prepare, review, and present reports, recommendations, and other correspondence and communications in a clear and concise manner.
- Understand and follow complex oral and written instructions.
- Organize and maintain accurate files and records.
- Type accurately at speeds necessary for successful job performance.
- Compose correspondence and reports independently or from brief instructions; maintain records and databases.
- Make accurate arithmetic computations.
- Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, Schedule and coordinate projects, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.

- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.

Administrative Assistant I: Equivalent to graduation from high school, and two (2) years of increasingly responsible clerical experience at a level equivalent to the County's class of Office Assistant II.

Administrative Assistant II: Equivalent to graduation from high school, and three (3) years of increasingly responsible office support experience, or two (2) years at a level equivalent to the County's class of Administrative Assistant I.

Licenses and Certifications:

- Some positions may require the possession of a valid Driver's License and maintain a satisfactory driving record.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.

WORKING CONDITIONS

May be required to attend boards/commission/committee meetings outside of regular work hours. If assigned to a Law and Justice Department, incumbents must pass a thorough background investigation.

Appendix B

Administrative Technician Classification Specification



AUGUST 2018
FLSA: NON-EXEMPT
Bargaining Unit: GE/CO
JCN: 1305

ADMINISTRATIVE TECHNICIAN

DEFINITION

Under general direction, performs a variety of responsible paraprofessional, technical, administrative, and secretarial support duties requiring the application of procedural, program, and compliance knowledge in support of a department, division, or program; assumes ongoing, technical responsibilities specific to area of assignment; coordinates assigned programs, projects, and services with other departments, divisions, and outside agencies; performs research and routine analysis on a wide variety of special projects; and performs related work as required

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned supervisory or management personnel. Incumbents may supervise or lead clerical administrative support staff as an ancillary duty.

CLASS CHARACTERISTICS

This is a fully qualified journey-level paraprofessional classification. Incumbents work under general direction and exercise a high level of tact, discretion, diplomacy, and independent judgment in performing a wide variety of specialized and confidential secretarial, technical and administrative support duties. The work has technical and procedural aspects, requiring the interpretation and application of and ensuring compliance with policies, procedures, requirements, and regulations and may involve frequent contact with staff and the public. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work department or division. Incumbents may supervise or lead clerical administrative support staff as an ancillary duty.

This class is distinguished from the Administrative Assistant classification series in that the latter are responsible for applying clerical and administrative procedures and requirements to perform duties that facilitate the work of an office and/or unit, such as receiving and controlling incoming correspondence, organizing and maintaining filing systems, organizing clerical processes, and gathering basic program and project status information.

This class is distinguished from the Administrative Analyst series in that the latter are professional-level classes with a broader range of variety and scope of duties and responsibilities in areas such as researching and analyzing practices and procedures, and assisting in developing recommendations for organizational, operational, policy, financial, budgetary, and procedural improvements in assigned areas.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

- Performs technical and procedural work in support of an assigned department, division, or program; applies technical procedures, methods, and techniques to support program and management analysis functions and processes; monitors and explains operational and program requirements and processes to various stakeholders.
- Assists in developing and monitoring assigned budgets, including gathering and reviewing financial data to identify and recommending account adjustments and fund transfers, developing narratives and project plans, monitoring labor hours and other expenses, ensuring accurate allocation to accounts,

providing account balances and updates to management and staff, processing invoices and purchase orders, maintaining budget spreadsheets, entering information into the financial software system, and attending budget meetings.

- Monitors, coordinates, organizes, and carries out administrative and technical assignments and projects; researches and compiles information and data from internal and external sources on topics related to assigned areas of responsibility; reviews, organizes, and summarizes data collected; compares data to identify trends and discrepancies; presents preliminary findings and recommendations in an appropriate format for review by senior professional, supervisory, or management staff.
- Researches, interprets, and ensures compliance with laws, codes, rules, and regulations, and County program guidelines, policies, and procedures related to assigned areas of responsibility.
- Composes, edits, proofreads, and submits Board of Supervisors, commissions, and committee agendas; staff, financial, budgetary, operational, and other technical and programmatic charts, reports, contracts and agreements; technical documentation; and various correspondence and informational material regarding assigned activities; may compile and process confidential material.
- Serves as a liaison or staff support to meeting and/or committee secretary, including preparing agendas and informational packets, posting required public notices pursuant to the law, local ordinances, and resolutions; setting up the room, and taking and transcribing minutes for assigned boards and committees.
- Verifies and reviews calculations, forms, and reports for accuracy, completeness, and conformance with established regulations and procedures.
- Evaluates office and inter-departmental procedures and makes recommendations for modifications as necessary to maintain efficient and effective office operations; assists in developing and implementing department/division objectives, policies, procedures, and work standards.
- Discusses analysis and conclusions with professional and/or management staff and drafts reports of study; relieves professional staff by following up on projects, transmitting information, and keeping informed of pertinent activities.
- Provides information to the public or County staff that requires the use of independent judgment, compliance with laws, and interpretation of policies, rules and procedures.
- Performs other clerical/administrative work as required, which may include, but is not limited to, typing and copying documents, scanning, filing/retrieving files, reviewing and processing mail, faxing information, answering the telephone, scheduling appointments and meetings, maintaining calendars, maintaining inventory of supplies and materials, etc.; listens to questions, and interprets and applies regulations, policies, procedures, systems, rules, and precedents according to existing guidelines; refers callers to the appropriate staff; coordinates or resolves problems of a moderate nature, when appropriate.
- Confers with representatives of other governmental agencies, business, professional and citizens' groups, vendors and the public.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Administrative techniques, including the principles of accounting, budget, and organizational analysis.
- Fundamental, statistical, and comparative analysis techniques and formulae.
- Public administration principles and practices.
- Applicable state, federal, and local laws, regulations, and policies and procedures applicable to department, division, and/or programs to which assigned.
- Basic principles and techniques of research, data collection, and report preparation.
- Principles of providing functional direction and training.
- Recordkeeping principles and procedures.

- Business mathematics and basic statistical techniques.
- Business letter writing and the standard format for reports and correspondence.
- Basic principles and practices of public agency budget administration.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Perform responsible technical, procedural, and administrative, secretarial support work with accuracy, speed, and general supervision.
- Perform difficult and complex administrative, statistical, and functional work involving the use of considerable independent judgment.
- Evaluate alternatives and make judgments within established policy and procedural guidelines.
- Interpret, summarize, and present administrative and technical information and data in an effective manner.
- Research, analyze, and summarize data and prepare accurate and logical written reports.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Make accurate mathematical, financial, and statistical computations.
- Maintain confidentiality and be discreet in handling and processing confidential information and data.
- Establish and maintain a variety of filing, record keeping, and tracking systems
- Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.
- Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.

Equivalent to graduation from high school;

AND

Four (4) years of increasingly responsible journey-level clerical or technical support experience which included responsibility for interpreting and explaining complex rules and regulations, researching

information and preparing accurate documents and reports, or advanced office support work that included data entry and the processing of forms and records;

OR

Equivalent to an associate degree from an accredited educational institution;

AND

Two (2) years of journey-level clerical or technical support experience which included responsibility for interpreting and explaining complex rules and regulations, researching information and preparing accurate documents and reports, or advanced office support work that included data entry and the processing of forms and records.

Licenses and Certifications:

- Some positions may require the possession of a valid Driver's License and maintain a satisfactory driving record.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with members of the public or with staff under emotionally stressful conditions while interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

If assigned to a Law and Justice Department, incumbents must pass a thorough background investigation.