




Agenda Date: January 17, 2019
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Estimated Time: N/A
Continued Item: No

Board Agenda Item

TO: Air Pollution Control District Board

FROM: Aeron Arlin Genet, Air Pollution Control Officer 

CONTACT: Kristina Aguilar, Administrative Manager (805-961-8813)

SUBJECT: Modifications to Classification Specifications

RECOMMENDATION:

Adopt revised class specifications entitled Office Technician and Accounting Technician I/II/III.

DISCUSSION:

Periodically the District reviews its organizational structure to ensure we are operating in an efficient and effective manner. At this time, we feel it is appropriate to adjust two class specifications, aligning them closer to the work performed in these job classes. There are also general updates to the class specifications regarding cleanup of grammatical errors or tasks that may no longer be needed due to technology advancements in the work place. No major revisions are being proposed and the affected union (Service Employees International Union, Local 620) has had an opportunity to review and comment on the class specifications.

Attached for your review and consideration are the following class specifications: Office Technician and Accounting Technician I/II/III.

FISCAL IMPACT:

There will be no fiscal impact on the District's budget, as the proposed revisions to these class specifications will not affect salary ranges.

ATTACHMENTS (2):

- A. Class Specification – Office Technician
- B. Class Specification – Accounting Technician I/II/III

ATTACHMENT A

Class Specification
Office Technician

January 17, 2019

Santa Barbara County Air Pollution Control District
Board of Directors

260 San Antonio Road, Suite A
Santa Barbara, California 93110



OFFICE TECHNICIAN

Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications may not include all duties performed by individuals within a classification. In addition, specifications are intended to outline the minimum qualifications necessary for entry into the class and do not necessarily convey the qualifications of incumbents within the position.

DEFINITION:

Under general supervision, performs a wide variety of specialized, highly responsible and complex clerical work in support of multiple divisions; provides clerical support to staff in all divisions; provides front desk reception duties; maintains mail room supplies and orders materials; and, performs related duties as required.

CLASS CHARACTERISTICS:

This class is responsible for moderately difficult clerical duties requiring considerable division/program knowledge and for performing routine administrative tasks in support of the District's divisions, including front desk reception duties. The position reports to the Administrative Division Supervisor.

ESSENTIAL FUNCTIONS: *(including, but not limited to, the following)*

- Provides clerical support to staff; greets visitors; answers phone calls and email requests; schedules meetings; distributes and files correspondence, documents, reports, and other materials.
- Prepares and distributes documents, such as agreements, contracts, permits, notices, and reports; submits public notices to local newspapers and agencies; inputs a variety of information into database systems and maintains tracking systems.
- Composes correspondence and compiles reports from a variety of sources; assists in the performance of administrative tasks, utilizing judgment in the application of policies and procedures; facilitates the transmission of documents and/or information to other offices and agencies.
- Receives inquires from the public, District staff and other agencies; answers phones and routes calls, or provides information requiring an understanding of District policies and procedures.
- Assists staff with a variety of administrative tasks using discretion, independent judgment and organizational skills; coordinates and completes special projects such as mass mailings of District related information, annual reports and rules updates; troubleshoots and resolves problems as they arise; completes projects under specified time constraints.
- Performs a variety of clerical tasks including word processing and/or data entry, proofreading, filing, editing, office machine operation; sorts, files, prepares, and/or processes a variety of documents and records according to established procedures; makes meeting arrangements; identifies office supply needs and orders supplies and equipment.
- Establishes and/or maintains a filing and retrieval system for interrelated files and records, both paper and electronic.
- Assists others in the performance of related tasks.
- Other duties as assigned and required to fulfill the essential functions of the position.

WORKING CONDITIONS:

Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, squatting, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement, and fine coordination in writing, preparing statistical reports, and evaluating data using a computer keyboard. Additionally, the position requires near vision when reading correspondence and statistical data on the computer, and acute hearing when providing telephone service and communicating in person. The need to lift, drag and push files, displays or other materials weighing up to 25 pounds also is required.

QUALIFICATIONS GUIDELINES: *(The following are minimal qualifications necessary for entry into the classification)*

Education and/or Experience

Any combination of education and/or experience that has provided the knowledge, skills, and abilities necessary for acceptable job performance. Example combinations include:

Equivalent to graduation from high school including or supplemented by course work in office procedures; use of the Microsoft Office Suite (Word, Excel, Outlook); database use and entry; paper and electronic filing and records management; and, three years of experience in performing increasingly responsible clerical work.

KNOWLEDGE/ABILITIES/SKILLS: *(The following are a representative sample of the KAS's necessary to perform essential duties of the position)*

Knowledge of: Working knowledge of related clerical and general office methods and techniques including office equipment operation; record keeping; word processing; use of databases; paper and electronic filing systems; use of computer network e-folders using Microsoft Windows. Working knowledge of the basic functions and organization of municipal governments. .

Ability to: Communicate effectively orally and in writing; prepare and present issues in a clear and logical format; understand District policies and procedures; keep accurate records; analyze situations carefully and adopt effective courses of action; understand the operation of the District, assigned division and outside agencies; compose correspondence independently; communicate effectively with a variety of personnel; explain and apply policies and procedures; interpret and apply rules, regulations, legislation and policies; understand and follow verbal and written directions; work independently; type accurately at an acceptable rate of speed; operate a computer and use a variety of computer software; compile and maintain complex records and files; edit documents for correct English grammar, punctuation, and spelling; maintain confidentiality of records and information; apply modern office practices and use office equipment; perform mathematical calculations; and, establish and maintain effective working relationships.

Skills to: Operate standard office equipment such as a computer, copier, scanner, shredder, and telephone. Use of voicemail, email, and a variety of word processing, database management, and other software applications.

SPECIAL REQUIREMENTS:

Possession of or ability to obtain and maintain a Class C California driver's license.

FLSA– Non-Exempt
SEIU Unit 23

Adopted: TBD

ATTACHMENT B

Class Specification
Accounting Technician I/II/III

January 17, 2019

Santa Barbara County Air Pollution Control District
Board of Directors

260 San Antonio Road, Suite A
Santa Barbara, California 93110



Accounting Technician I/II/III

Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications may not include all duties performed by individuals within a classification. In addition, specifications are intended to outline the minimum qualifications necessary for entry into the class and do not necessarily convey the qualifications of incumbents within the position.

DEFINITION:

Under immediate supervision (I), general supervision (II), and limited supervision (III), performs specialized and technical accounting and financial recordkeeping support work in a variety of accounting functions including accounts payable, accounts receivable, financial reporting, and grant applications. Performs other duties as required.

CLASS CHARACTERISTICS:

Accounting Technician I is the entry and training class of the series. Incumbents work under immediate supervision while learning District practices, rules, policies and procedures. The Accounting Technician I performs routine and less complex assignments of the unit. Work becomes increasingly complex over time and requires less supervision as additional skills and abilities are acquired.

Accounting Technician II is the fully experienced, journey-level class of the series, which requires performance of more difficult tasks requiring a working knowledge of District rules, policies, and procedures; accounting principles and practices; financial recordkeeping; and budget preparation. Incumbents work under general supervision and perform the full range of duties for the position.

Accounting Technician III is the advanced journey-level class of the series and performs the most difficult and complex tasks. Incumbents work with minimal supervision; are lead workers; exercise independent judgment and decision-making; and administer programs/projects within the Division.

These positions report to the Administrative Division Supervisor.

ESSENTIAL FUNCTIONS: *(including, but not limited to, the following)*

- Reviews accounting and financial documents to ensure accuracy, completeness of information, and proper authorization and compliance for District policies and procedures.
- Process payments for accounts payable, contracts, and advisory boards.
- Prepares deposits by matching payments to accounts receivable, determining correct account designations of pre-paid payments, and posting payments to customer accounts.
- Performs monthly balancing of trust fund, revenue, and expenditure data.
- Distributes petty cash; and processes travel requests, purchase requests, and expense reimbursements verifying budget allocations.
- Prepares labor invoices for monthly, semi-annual, and annual billings.
- Monitors labor expenses, services, and supplies against budget appropriations and actual expenditures and generates reports.

- Performs annual renewal of purchase contracts and purchase orders.
- Prepares financial applications for grant submissions; maintains files and records; and produces quarterly and final progress reports.
- Conducts monthly balancing of accounts payable and accounts receivable ledgers and/or general ledger financial systems to ensure accuracy of transactions.
- Acts as back up for other fiscal and office line staff.
- Other duties as assigned and as required to fulfill the essential functions of the position.

WORKING CONDITIONS:

Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, squatting, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement, and fine coordination in writing, preparing statistical reports, and evaluating data using a computer keyboard. Additionally, the position requires near vision when reading correspondence and statistical data on the computer, and acute hearing when providing telephone service and communicating in person. The need to lift, drag and push files, displays or other materials weighing up to 25 pounds also is required.

QUALIFICATION GUIDELINES: *(The following are minimal qualifications necessary for entry into the classification)*

Education and/or Experience

Any combination of education and/or experience that has provided the knowledge, skills, and abilities necessary for acceptable job performance. Example combinations include:

Accounting Technician I Successful completion of an equivalent of 15 units from an accredited learning institution in the disciplines of accounting, finance, business or public administration, or a closely related field.

Accounting Technician II Successful completion of an equivalent of 30 units from an accredited learning institution in the disciplines of accounting, finance, business or public administration, or a closely related field; **and** two years equivalent experience of an Accounting Technician I. An associate degree or higher in any of the preferred disciplines may be substituted for one year of experience.

Accounting Technician III Graduation with the equivalent of an Associate's degree from an accredited college or university preferably with a major in accounting, finance, business or public administration, or a closely related field; two years equivalent experience of an Accounting Technician II; **and** one additional year of increasingly responsible professional experience performed in an independent manner. A bachelor's degree in any of the preferred disciplines may be substituted for one year of experience.

KNOWLEDGE/ABILITIES/SKILLS: *(The following are a representative sample of the KAS's necessary to perform essential duties of the position)*

Knowledge of: Principles and practices of double-entry accounting; principles and practices of purchasing; account structures; financial reports and reporting; computerized accounting system software; month-end and year-end closing procedures and practices including the accrual process; and basic business math.

Ability to: Communicate effectively orally and in writing; prepare clear, complete, and technically accurate reports; gather and analyze data; prepare and present data in logical format; identify, research, and solve accounting problems; perform mathematical calculations related to financial transactions; create and analyze spreadsheets; read and understand District policies and procedures; interpret and work with large amounts of numeric data; perform multiple tasks and meet numerous deadlines; form conclusions and make sound decisions; and, establish and maintain effective working relationships.

Skills to: Accurately input both alpha and numeric data into spreadsheets and databases; operate a 10-key calculator by touch; operate standard office equipment such as an office computer, copier, shredder, telephone, voicemail, and fax; and a variety of word processing, data management, and other software applications.

SPECIAL REQUIREMENTS:

Possession of or ability to obtain and maintain a Class C California driver's license.

FLSA– Non-Exempt
SEIU Unit 23

Adopted: TBD