



# Memorandum

**TO:** HONORABLE MAYOR AND  
CITY COUNCIL

**FROM:** Jennifer Schembri

**SUBJECT: AMENDMENTS TO THE CITY  
PAY PLAN FOR VARIOUS  
CLASSIFICATIONS**

**DATE:** October 25, 2018

Approved

Date

10-26-18

## RECOMMENDATION

Adopt a resolution to amend the City of San José Pay Plan effective November 18, 2018, to:

1. Change the salary range for the following classifications:
  - a. Staff Specialist FT/PT (1622/1624) with a salary range of \$59,342.40 - \$72,113.60 to a new salary range of \$59,924.80 - \$72,841.60 annually;
2. Retitle the following classifications:
  - a. Currently Administrative Assistant C FT/PT to Administrative Assistant FT/PT (1159/8159);
  - b. Currently Analyst I/II C FT/PT to Analyst I/II FT/PT (1627/1630/1632/1635); and
  - c. Currently Legal Administrative Assistant I/II C FT/PT to Legal Administrative Assistant I/II FT/PT (1167/1153/1168/1154);
3. Delete the following classifications:
  - a. Legislative Research Specialist U (1662);
  - b. Network Engineer C FT/PT (8555/8556);
  - c. Network Technician C I/II/III FT/PT (8550/8557/8551/8552/8553/8554);
  - d. Office Specialist C I/II FT/PT (1127/1129/1131/1134);
  - e. Secretary C FT/PT (1157/1158); and
  - f. Staff Technician FT/PT (1623/1660).

## OUTCOME

If the above recommendation is approved, the City of San José Pay Plan will be amended to change the salary range for Staff Specialist FT/PT (1622/1624); retitle Administrative Assistant FT/PT (1159/8159) (currently Administrative Assistant C FT/PT), Analyst I/II FT/PT (1627/1630/1632/1635) (currently Analyst I/II C FT/PT), Legal Administrative Assistant I/II FT/PT (1167/1153/1168/1154) (currently Legal Administrative Assistant I/II C FT/PT);

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and delete Legislative Research Specialist U (1662), Network Engineer C FT/PT (8555/8556), Network Technician C I/II/III FT/PT (8550/8557/8551/8552/8553/8554), Office Specialist C I/II FT/PT (1127/1129/1131/1134), Secretary C FT/PT (1157/1158), and Staff Technician FT/PT (1623/1660) classifications.

## **BACKGROUND**

The City of San José Pay Plan must be amended by Council Resolution when new job classifications are added or deleted, job titles are changed, or salaries are revised. The City Pay Plan reflects all job classification and compensation changes made through Council Resolution. The City Pay Plan is on file in the Human Resources Department and published on the City's Internet and Intranet sites.

## **ANALYSIS**

### **Staff Specialist and Staff Technician Consolidation**

In Fiscal Year 2016-2017, the Human Resources Department retained Koff & Associates to conduct a class specification study to update approximately 69 classifications Citywide. Among the classifications updated were Staff Specialist and Staff Technician. Human Resources distributed position description questionnaires to a sample of employees in these classifications. During the analysis, it was determined that the job duties performed by the incumbents in these classifications were similar in nature and scope of work. Historically, departments have used these classifications interchangeably to perform duties at this level. Consolidation of these classes will streamline the classification structure.

Additionally, effective October 7, 2018, the Confidential Employees' Organization (CEO), AFSCME Local 101 was merged with Municipal Employees Federation (MEF), AFSCME Local 101 bargaining unit. As such, the CEO bargaining unit has been eliminated and all classifications and employees in classifications currently represented by CEO have been reassigned to MEF. Please refer to the Information Memo sent to the City Council dated October 4, 2018 for information regarding the merger (Attachment).

The proposed salary for the Staff Specialist FT/PT classifications is based on internal equity, to align with the existing Staff Technician salary range.

Staff Specialist - with a current annual pay range of \$59,342.40 - \$72,113.60 to a new annual pay range of approximately \$59,924.80 - \$72,841.60: Responsibilities include paraprofessional administrative work in various areas of public administration. Conducts research and compiles data for general or departmental use; may analyze data and prepare reports. Responds to inquiries and explains policies and procedures to others; suggests changes in procedure or formulation of new procedures as they relate to departmental needs. Reviews records, identifies discrepancies, and researches information. Coordinates the

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maintenance of files, including automated recordkeeping systems; develops filing systems and procedures for file use; and ensures that documents can be retrieved.

Once the classifications are consolidated, Human Resources is recommending to delete the Staff Technician classification from the pay plan as the classification will be obsolete.

#### Retitle of Classifications

The following classifications will be retitled as part of the CEO merge into MEF:

- a. Administrative Assistant FT/PT (currently Administrative Assistant C FT/PT);
- b. Analyst I/II FT/PT (currently Analyst I/II C FT/PT); and
- c. Legal Administrative Assistant I/II FT/PT (currently Legal Administrative Assistant I/II C FT/PT).

#### Deletion of Classifications

The following classifications will be deleted because they are obsolete:

- a. Legislative Research Specialist U;
- b. Network Engineer C FT/PT;
- c. Network Technician C I/II/III FT/PT;
- d. Office Specialist C I/II FT/PT;
- e. Secretary C FT/PT; and
- f. Staff Technician FT/PT.

#### **EVALUATION AND FOLLOW-UP**

No additional City Council action is expected following the adoption of the proposed resolution.

#### **PUBLIC OUTREACH**

This memorandum will be posted on the City's website for the November 6, 2018, City Council Agenda.

#### **COORDINATION**

This memorandum was coordinated with the City Manager's Budget Office, the Office of Employee Relations, and the City Attorney's Office.

**COMMISSION RECOMMENDATION/INPUT**

Revisions to the Pay Plan for classified positions are reported to the Civil Service Commission for filing at the first regularly scheduled meeting following Council action.

**COST SUMMARY/IMPLICATIONS**

Human Resources has identified 28 full-time Staff Technicians and 1 part-time Staff Technician that will be moved over to the Staff Specialist classification, and 58 full-time Staff Specialists that will receive a salary adjustment. The ongoing increased cost is approximately \$74,000, \$43,000 of which is in the General Fund. Budget adjustments will be brought forward in a future budget process in 2018-2019, if necessary.

There is no cost implication to retitle or delete classifications from the pay plan.

**CEQA**

Not a Project, File No. PP10-068(b), Municipal Code, Title 3.

/s/

JENNIFER SCHEMBRI

Director of Employee Relations and  
Acting Human Resources Director

For questions, please contact Aracely Rodriguez, Employment Division Manager, at (408) 975-1411.

**Attachments:**

Information Memo dated October 4, 2018

Administrative Assistant FT/PT Class Specification

Analyst I/II FT/PT Class Specification

Legal Administrative Assistant I/II FT/PT Class Specification

Staff Specialist FT/PT Class Specification

# Memorandum

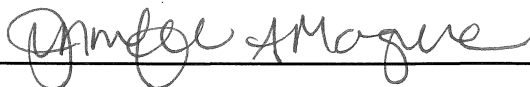
**TO:** HONORABLE MAYOR  
AND CITY COUNCIL

**FROM:** Jennifer Schembri

**SUBJECT:** SEE BELOW

**DATE:** October 4, 2018

Approved



Date

10-4-18

**SUBJECT: CONFIDENTIAL EMPLOYEES' ORGANIZATION, AFSCME LOCAL 101 (CEO) MERGER WITH THE MUNICIPAL EMPLOYEES' FEDERATION, AFSCME LOCAL 101 (MEF)**

## INFORMATION

This memorandum is to inform the City Council that, effective October 7, 2018, the Confidential Employees' Organization, AFSCME Local 101 (CEO) will be merged with the Municipal Employees' Federation, AFSCME Local 101 (MEF). There are approximately 205 employees represented by CEO as of October 2, 2018. The approximately 34 classifications represented by CEO will be re-designated as represented by MEF and the CEO bargaining unit will be eliminated.

In July 2018, the City notified both CEO and MEF of its intent to merge CEO with MEF, and to re-designate the classifications currently represented by CEO into MEF, pursuant to Employer-Employee Relations Resolution No. 39367. In lieu of an appeal, CEO agreed to negotiate the terms of the merger with the City and MEF, and the City has been coordinating with CEO and MEF on the merger. In addition, CEO employees were notified of the merger via notice sent by mail on or about September 27, 2018.



Jennifer Schembri  
Director of Employee Relations/  
Acting Director of Human Resources

For questions, please contact Marco Mercado, Assistant to the City Manager with the Office of Employee Relations, at (408) 535-8156.



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

**Title: Administrative Assistant FT/PT (1159/8159)**

| <b>DEPARTMENT</b> | <b>ACCOUNTABLE TO</b> | <b>FLSA STATUS</b> |
|-------------------|-----------------------|--------------------|
| Varies            | Varies                | Non-exempt         |

**CLASS SUMMARY**

Under direction, performs administrative and secretarial work; provides general office and administrative management for a City Executive or Councilmember. Serves as a representative with the public, Department personnel, City personnel, and special interest and political groups in establishing and maintaining control of confidential and sensitive information; monitors completion of time sensitive department projects; ensures effective time management and daily scheduling of the official calendar. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

Incumbents of this class work directly with top management, commissions, and the City Council and perform the most complex and sensitive secretarial and administrative support duties. The emphasis of this class is on the execution or coordination of administrative detail for the assigned City Executive or Council Member. Incumbents regularly work on tasks that are varied, requiring considerable discretion and independent judgment. Positions in this classification rely on experience and judgment to ensure the efficient and effective functioning of the assigned City Executive or Councilmembers office. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. This class differs from that of Secretary in that incumbents of the latter perform relatively less difficult, varied, and responsible secretarial duties.

**QUALIFICATIONS**

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

**Minimum Qualifications**

**Education and Experience**

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND six (6) years of experience in clerical and secretarial work, including two (2) years providing individual support to an executive.

**Acceptable Substitution**

None

**Other Qualifications**

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

**Basic Competencies**

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

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

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

**Title: Administrative Assistant FT/PT (1159/8159)**

- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Building Trust – Communicates an understanding of the other person's interests, needs and concerns; identifies and communicates shared interests and goals; identifies and communicates differences as appropriate; demonstrates honesty, keeps commitments, and behaves in an appropriate manner.
- Flexibility - Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- Initiative - Exhibits resourceful behaviors toward meeting job objectives; anticipates problems, is proactive, and avoids difficulties by planning ahead; displays willingness to assume extra responsibility and challenges; pursues continuing education opportunities that promote job performance.
- Reliability - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

| <b>DUTY NO.</b> | <b>TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b>  | <b>FREQUENCY*</b>   |
|-----------------|---|---------------------|
| 1.              | Acts as Executives or Councilmembers representative with the public, Department personnel, City personnel, and special interest and political groups in establishing and maintaining control of confidential and sensitive information; represents the Executive or Councilmember at meetings and conferences as requested. | Daily/Several Times |
| 2.              | Interprets and transmits Executive or Councilmember decisions, views, and directives to Department staff, citizens groups, and the public. Follows up and informs Executive or Councilmember of special concerns requiring attention.   | Daily/Several Times |
| 3.              | Ensures effective time management and daily scheduling of official calendar. Informs Executive or Councilmember of all pending appointments/meetings and ensures that necessary materials are prepared before meetings.   | Daily/Several Times |
| 4.              | Screens incoming calls and materials and recommends or institutes appropriate actions. Answers inquiries and resolves complaints from the public not requiring the Executives or Councilmembers attention.  | Daily/Several Times |

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

**Title: Administrative Assistant FT/PT (1159/8159)**

| <b>DUTY NO.</b> | <b>TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b>  | <b>FREQUENCY*</b>   |
|-----------------|---|---------------------|
| 5.              | Prepares and coordinates all travel arrangements and expense reimbursements for Executive or Councilmember. Processes reimbursement requests, , procurement card statement approvals, and other related fiscal documents. Prepares/conducts financial transactions and forms on behalf of the Executive and Councilmember, such as event registrations, office supplies and services, business cards, promotional items, and letterhead. Reviews and edits to ensure correspondence and/or documentation is complete and accurate and ready for supervisors approval. | Daily/Several Times |
| 6.              | Operates and utilizes a variety of standard office equipment, including but not limited to computers, printers, scanners, phones, calculators, fax, software programs, and accounting machines and equipment.   | Daily/Several Times |
| 7.              | Reviews for appropriate distribution Departments City Council referrals/service requests; distributes to appropriate staff for action, follows up on disposition; informs City Council liaison of any date or agenda change. Reviews mail, assigns to appropriate staff for action, and follows up on its disposition.  | Daily               |
| 8.              | Analyzes, develops, and implements procedures for expediting administrative work flow for an Executives or Councilmembers office.   | Daily               |
| 9.              | Coordinates and monitors Departmental agenda items for a variety of boards, commissions, committees and City Council meetings. Composes correspondence in accordance with Commission or Council actions; develops a timeline to ensure that departments are notified and reminded in a timely manner so they are able to submit their reports before or by the deadline; ensures reports have been reviewed by appropriate departments. Coordinates meetings as needed.   | Daily               |
| 10.             | Coordinates the completion of the public records requests, internal and external regulatory filings, compliance calendar, and related requests; may coordinate with staff to obtain information; assists in researching, report preparation, or submission of requests.   | Weekly              |
| 11.             | Compiles and prepares data for a variety of Department reports. Implements and revises records, forms, filing systems, and procedures.  | Intermittent        |
| 12.             | Supervises, instructs, and evaluates clerical personnel to ensure efficient clerical service for the Department. Instructs staff on clerical procedures to ensure efficiency for the Department. Facilitates new employee set up orientation/ training on office procedures and desktop help as necessary.  | Intermittent        |
| 13.             | Performs other related duties as required.  | As required         |

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

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

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

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;

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

**Title: Administrative Assistant FT/PT (1159/8159)**

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

**CLASSIFICATION HISTORY** *Rev. & Ret. 11/88 (Formerly Executive Secretary), Rev. & Ret. 04/89 (Formerly Executive Administrative Secretary (1159) - class consolidation), Rev. & Ret. 07/97 (Formerly City Council Administrative Secretary (1160) - class consolidation), Rev. 1/01, Rev. 11/18; s004*

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

**Title: Analyst I/II FT/PT (1627/1632/1630/1635)**

| <b>DEPARTMENT</b> | <b>ACCOUNTABLE TO</b> | <b>FLSA STATUS</b> |
|-------------------|-----------------------|--------------------|
| Varies            | Varies                | Non-exempt         |

**CLASS SUMMARY**

Under general supervision (Analyst I) or direction (Analyst II), is responsible for professional level analytic work in support of an assigned functional area such as budget, finance, grant administration, organizational analysis, general administration and human resources. Assignment areas may be department specific, or may include functions encompassing multiple departments. Conducts studies, analyzes data and prepares conclusions. Coordinates services with other City departments, divisions, outside agencies and private organizations, and the general public. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

The Analyst I/II is the flexibly staffed entry/journey class in the Analyst series, described as follows:

**Analyst I** - This is the entry-level class in the Analyst classification series. This class is responsible for providing support for an assigned operational and/or program area where expertise is gathered in a specific field of work. Positions at this level are not expected to function with the same amount of knowledge or skill level as positions allocated to the Analyst II 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. As experience is gained, assignments become more varied and are performed with greater independence.

**Analyst II** - This is the journey-level class in the Analyst classification series responsible for performing the full range of professional support for an assigned operational and/or program area. Incumbents are expected to work independently and exercise judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Analyst II is distinguished from Analyst I in that they may provide training to an Analyst I and/or clerical staff. This class is distinguished from the Senior Analyst in that the latter class performs the most complex work assigned to the series, including serving as a supervisor over professional staff.

**QUALIFICATIONS**

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

**Minimum Qualifications**

**Education and Experience**

***Analyst I***

A Bachelor's Degree from an accredited college or university.

***Analyst II***

A Bachelor's Degree from an accredited college or university AND two (2) years of increasingly responsible professional staff analytic or administrative experience conducting studies, organizing and analyzing data, and preparing reports, recommendations, or conclusions for a functional area in budget, finance, grant administration, organizational analysis, general administration, or human resources.

**Acceptable Substitution**

Experience as a Staff Specialist with the City of San José may be substituted for the education requirement on a year for year basis.

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

**Title: Analyst I/II FT/PT (1627/1632/1630/1635)**

**Other Qualifications**

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

**Basic Competencies**

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

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Analytical Thinking – Approaching a problem or situation by using a logical, systematic, sequential approach.
- Collaboration – Develops networks and builds alliances; engages in cross-functional activities.
- Continuous Improvement - Actively identifies new areas for learning and regularly creates and takes advantage of learning opportunities.
- Customer Service – Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- Decision Making - Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Fiscal Management – Understands the relationship of the budget and resources to the strategic plan; complies with administrative controls over funds, contracts, and procurements.
- Flexibility - Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- Problem Solving - Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Reliability – Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

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

**Title: Analyst I/II FT/PT (1627/1632/1630/1635)**

| <b>DUTY NO.</b> | <b>TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b>  | <b>FREQUENCY*</b> |
|-----------------|---|-------------------|
| 1.              | Gathers, organizes, and analyzes data relating to specific assignments which require research from which conclusions can be drawn; prepares analyses and reports with recommendations/options; explains report recommendations and conclusions to customers.  | Daily             |
| 2.              | Obtains data and other information from operating departments through use of questionnaires, personal visit, and otherwise as indicated; assembles, arrays, processes, and analyzes data; prepares studies and reports as indicated; and proposes or suggests appropriate action to supervisor/management.  | Daily             |
| 3.              | Confers with departmental management and others on administrative problems; gathers and analyzes facts about departmental organization, staffing, and work load; evaluates and prepares recommendations on departmental requests for program changes; provides for and assists in the installation of improved systems or organization; and prepares and revises policy and procedures manuals and instructional materials. | Daily             |
| 4.              | May assist in training less experienced professional staff in work methods and procedures. Acts as a lead/subject matter expert with newer staff who frequently ask questions or ask for direction pertaining to past/best practices.   | Daily             |
| 5.              | Supervises clerical or technical personnel in administrative support functions as assigned. May provide lead direction and training to support staff by assigning, reviewing and providing feedback on tasks.   | Daily             |
| 6.              | As assigned, provides highly technical support in determining the organization, administration, operations, and functions of an operating department or division by developing the organizational unit, identifying lines of authority and supervisory responsibility, and recommending on the number and organizational assignments for all authorized positions in the department.  | Daily             |
| 7.              | As assigned, provides professional support within an assigned human resources program area such as recruitment, selection, classification, compensation, workers compensation, and training; coordinates program services internally and externally, performing administrative and technical tasks to deliver program services.   | Daily             |
| 8.              | As assigned, investigates and attempts to resolve customer complaints and/or inquires. a  | Daily             |
| 9.              | As assigned, participates with groups in analyzing and evaluating community conditions and needs; offers guidance and counsel in the establishment of goals and techniques of achievement.  | Daily             |
| 10.             | As assigned, provides support to the City's and department's budget process; reviews budget requests; summarizes findings; assembles and analyzes data; proposes or suggests appropriate actions including reallocation of resources; works with operating departments to facilitate budget proposal preparation and execution of adopted budgets.  | Daily             |

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

**Title: Analyst I/II FT/PT (1627/1632/1630/1635)**

| <b>DUTY NO.</b> | <b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:   | <b>FREQUENCY*</b> |
|-----------------|--|-------------------|
| 11.             | As assigned, provides professional support within a department's fiscal program; reviews and prepares accounting transactions such as journal vouchers, encumbrance reviews, liquidations, and billings and receivables. May respond to internal and/or external auditors' questions and/or requests as needed. Assists project managers with processing special payroll requests. Assists in, and/or prepares and distributes a variety of fiscal reports and documents.  | Daily             |
| 12.             | As assigned performs grant sourcing, fiscal oversight and administrative tasks; reviews grant proposals and, working both internally and externally, develops applications and work/implementation plans for grant projects; designs and maintains an individual monitoring system for each grant project; participates in the development of grant contracts; negotiates scope, goals, outcome measures and schedules; prepares draft contracts and supporting documentation; monitors grant activities to ensure they remain in scope with terms and conditions for the grant; tracks grant spending to ensure that funds are expended within the grant terms and conditions; prepares and distributes reports on grant operations and activities. | Daily             |
| 13.             | Performs other related duties as assigned.   | As Required       |

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

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

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

In an office environment, possess ability to:

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

**CLASSIFICATION HISTORY** Created 3/80 & 5/80, (Formerly Analyst I/II & Staff Analyst II), I Rev. 6/89, Rev. 4/90, I Rev. 3/94, Rev. 7/97, Rev. 11/18; s003/s002

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

**Title: Legal Administrative Assistant Trainee (1165)**  
**Legal Administrative Assistant I/II FT/PT (1167/1153/1168/1154)**

| DEPARTMENT             | ACCOUNTABLE TO | FLSA STATUS |
|------------------------|----------------|-------------|
| City Attorney's Office | Varies         | Non-exempt  |

**CLASS SUMMARY**

Under immediate (Legal Administrative Assistant Trainee and Legal Administrative Assistant I) to general supervision (Legal Administrative Assistant II) performs a variety of legal administrative assistant duties within the Office of the City Attorney; drafts, proofreads, and reviews legal materials to ensure conformance to standard legal and office style and accuracy, including accuracy of citations and code references; identifies applicable procedural rules and statutes; performs work related to a variety of legal matters; serves as contact person in answering inquiries and complaints, providing information related to the Office of the City Attorney. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

The Legal Administrative Trainee/Legal Administrative Assistant I/II is a flexibly staffed trainee/entry/journey class in the Legal Administrative series, described as follows:

Legal Administrative Assistant Trainee – This is the trainee level class in the Legal Administrative Assistant series responsible for providing administrative support within the Office of the City Attorney by learning the diverse tasks, policies, procedures and document preparation standards within the department. Work is highly supervised while in progress and fits an established structure or pattern. This class is distinguished from the higher level class of Legal Administrative Assistant I in that the incumbents of that class have learned department operations, procedures and standards and perform the more routine legal document preparation. This class is distinguished from classes in the Office Specialist series in that the incumbents of that series perform general clerical work, whereas incumbents of this class perform specialized work involving the use of legal terminology and procedures.

Legal Administrative Assistant I – This is the second and first working level class in the Legal Administrative Assistant series responsible for providing administrative support within the Office of the City Attorney. Positions at this level are not expected to function with the same knowledge or skill level as positions allocated to the Legal Administrative Assistant II level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work continues to be supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

Legal Administrative Assistant II - This is the journey level class in the Legal Administrative Assistant series responsible for performing the full range of legal administrative support duties within the Office of the City Attorney. Incumbents are expected to work independently and exercise judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

**QUALIFICATIONS**

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

**Minimum Qualifications**

**Education and Experience**

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

**Title: Legal Administrative Assistant Trainee (1165)**  
**Legal Administrative Assistant I/II FT/PT (1167/1153/1168/1154)**

***Legal Administrative Assistant Trainee C***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND experience equivalent to two (2) years of responsible experience in stenographic (transcription or word processing) and clerical work, preferably with one (1) year of experience having been acquired in a law office.

***Legal Administrative Assistant I C***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND experience equivalent to one (1) year of experience in legal administrative assistant work preparing and formatting legal documents such as pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.

***Legal Administrative Assistant II C***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND experience equivalent to three (3) years of experience in legal administrative assistant work including one (1) year of preparing and formatting complex legal documents such as pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.

**Acceptable Substitution**

***Legal Administrative Assistant Trainee C***

A certificate and/or degree in legal secretarial studies or related field, or an Associate's Degree from an accredited college may be substituted for one (1) year of responsible experience stenographic (transcription or word processing) and clerical work.

**Other Qualifications**

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

**Basic Competencies**

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

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Customer Service - Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.

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

**Title: Legal Administrative Assistant Trainee (1165)**

**Legal Administrative Assistant I/II FT/PT (1167/1153/1168/1154)**

- Flexibility – Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- Initiative - Exhibits resourceful behaviors toward meeting job objectives; anticipates problems, is proactive, and avoids difficulties by planning ahead; displays willingness to assume extra responsibility and challenges; pursues continuing education opportunities that promotes job performance.
- Multi-Tasking – Can handle multiple projects and responsibilities simultaneously; has handled a wide variety of assignments in past and/or current position(s).
- Planning – Acts to align own unit's goals with the strategic direction of the organization; Defines tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives.
- Problem Solving – Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Reliability - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

| <b>DUTY NO.</b> | <b><u>TYPICAL CLASS ESSENTIAL DUTIES:</u> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b>  | <b>FREQUENCY*</b>   |
|-----------------|--|---------------------|
| 1.              | Performs administrative support duties for attorney and other staff, such as screening visitors and calls; processing and distributing mail; arranging schedules; maintaining attorney's appointments, departmental, and litigation calendars and reminders; and handling travel-related details.  | Daily/Several Times |
| 2.              | Prepares, proofreads, and reviews materials such as legal papers, contracts, amendments, ordinances, resolutions, discovery, pleadings and court documents to ensure accuracy of dates, clarity of wording and language, conformance to standard legal style, consistency between clauses and/or provisions, verification of accuracy of citations and code references through use of the law library and various websites, and completeness of all appropriate supporting documentation; notes necessary changes, additions, deletions, and corrections for review and approval by an attorney or supervisor. | Daily/Several Times |
| 3.              | Drafts and formats a variety of legal and general documents on a word processor; composes correspondence, memoranda and other material from verbal instruction, or independently as appropriate; utilizes a document management system.  | Daily/Several Times |
| 4.              | Works with various software applications as they relate to the preparation and filing of legal and other documents; operates standard office machines and equipment.   | Daily/Several Times |

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

**Title: Legal Administrative Assistant Trainee (1165)**  
**Legal Administrative Assistant I/II FT/PT (1167/1153/1168/1154)**

| <b>DUTY NO.</b> | <b><u>TYPICAL CLASS ESSENTIAL DUTIES:</u> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b>  | <b>FREQUENCY*</b>   |
|-----------------|--|---------------------|
| 6.              | Prepares and updates the confidential Closed Session agenda and Brown Act required documents.  | Daily/Several Times |
| 7.              | Serves as contact person in answering inquiries and complaints from multiple sources; forwards inquiries, complaints and messages to appropriate staff for action; provides information related to the work of the Office to the public, law firms, courts, and various City, County, State, Federal, other public and private agencies/entities; routinely obtaining information as requested or needed.                            | Daily               |
| 8.              | Performs work related to a variety of legal matters such as: discovery, tables of contents and points of authorities, tort claims and litigation, personnel matters, code enforcement, eminent domain, contracts, appropriations, taxes, land use, general plan, zoning; political activities, community development and various other categories of legal work; researches and identifies applicable procedural rules and statutes. | Daily               |
| 9.              | Provides assistance upon request and/or coordinates with other Legal Administrative Assistants in the Office; and participates in the orientation and various trainings on specific position to other office staff. Assists in the development of office procedures as requested.  | Daily               |
| 9.              | Performs other related duties as assigned.   | As Required         |

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

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

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

In an office environment, possess ability to:

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

**CLASSIFICATION HISTORY** (Formerly titled *Legal Secretary I/ II*), Created 5/80, Rev. 1/83, Rev. 1/84, Rev. 7/90, Rev. 7/98, Rev. 09/03, Rev. 09/18, Rev. 11/18; s005

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

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

| <b>DEPARTMENT</b> | <b>ACCOUNTABLE TO</b> | <b>FLSA STATUS</b> |
|-------------------|-----------------------|--------------------|
| Varies            | Varies                | Non-exempt         |

**CLASS SUMMARY**

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

**DISTINGUISHING CHARACTERISTICS**

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

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

**QUALIFICATIONS**

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

**Minimum Qualifications**

**Education and Experience**

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

**Acceptable Substitution**

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

**Other Qualifications**

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

**Basic Competencies**

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

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

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

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

| <b>DUTY NO.</b> | <b><u>TYPICAL CLASS ESSENTIAL DUTIES:</u> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b> | <b>FREQUENCY*</b>   |
|-----------------|---|---------------------|
| 1.              | Conducts researches and compiles data for general or departmental use; reviews and coordinates results and provides report information and data to requestor.   | Daily/Several Times |

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

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

|     |  |                     |
|-----|--|---------------------|
| 2.  | Responds to inquiries and explains policies and procedures to others. Suggests changes in procedure or formulation of new procedures as they relate to departmental needs; works with a variety of agencies, other departments and the public to research and communicate information, and may assist in resolving administrative issues.  | Daily/Several Times |
| 3.  | Responds to routine records/information requests within City guidelines and policies and procedures, provides documents, or refers to higher level staff for requests outside scope of authority, including redaction provisions; maintains a log of information/records released.   | Daily/Several Times |
| 4.  | Responsible for the maintenance of files, including automated recordkeeping systems; develops filing systems and procedures for file use; maintains automated files; and ensures that documents can be retrieved.  | Daily/Several Times |
| 5.  | Utilizes a wide variety of computer applications and equipment including, but not limited to, some or all of the following: online computer systems, word processing software, database systems, automated recordkeeping systems, automated tracking programs, spreadsheets, presentation and graphics software.   | Daily/Several Times |
| 6.  | Provides administrative support for division, including the review and preparation of invoices for approval; development of task orders and purchase orders; preparation of travel requests and reimbursement reports, travel arrangements including flights, lodging, registration; may assist in the preparation of Procurement Card (p-Card) statement reports and employee reimbursements.             | Daily/Several Times |
| 7.  | Serves as primary responder to phone and email inquiries/complaints; provides information and performs active problem-solving for customers; shares issues with other divisions, management, and partners as appropriate; monitors customer service related activity and conducts periodic reviews.  | Daily               |
| 8.  | May act as a lead or supervisor to clerical personnel in administrative support functions, assigning, scheduling and checking work, providing technical direction, determining priorities, and training staff. As a lead, may sign timecards and may give input to the supervisor regarding hiring, promotion, termination and discipline of employees; drafts and participates in performance appraisals. | Daily               |
| 9.  | Participates in analyzing the organization, administration, and functions in a department or large program; and revises/develops forms, records, filing systems, and procedures. Creates various templates to standardize documents and minimize process for easy information retrieval of information/records released.   | Weekly              |
| 10. | Procures supplies and equipment for assigned organizational unit; conducts unit inventory and control; conducts study of space needs and utilization.  | Weekly              |
| 11. | Participates in preparation of a variety of written materials relative to employee and public information; performs independent  | Weekly              |

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

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

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

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

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

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

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

**CLASSIFICATION HISTORY** Created 3/80, Rev. 1/84, Rev. 11/97, Staff Specialist Rev. and Ret. 9/01 (formerly Staff Technician), Rev. and consolidation 11/18; s002