Attachment E

Series Specification	Class Codes	Job Classification
Account Clerk	1733	Account Clerk II
	1730	Senior Account Clerk
Accounting Administrator	4552	Accounting Administrator I (Specialist)
	4549	Accounting Administrator I (Supervisor)
	4542	Accounting Administrator II
	4545	Accounting Administrator III
Accounting Analyst	4588	Associate Accounting Analyst
Accounting Officer	4179	Accountant Trainee
	4546	Accounting Officer (Specialist)
	4567	Senior Accounting Officer (Specialist)
Administrative Assistant II	5358	Administrative Assistant II
Administrative Assistant to Board Member	9389	*
Assistant Board Member	4272	*
Assistant Clerk	1123	Assistant Clerk
Assistant Tax Service Specialist	5692	Assistant Tax Service Specialist
Associate Administrative Analyst (Accounting System)	5304	Associate Administrative Analyst (Accounting Systems)
Associate Budget Analyst	5284	Associate Budget Analyst
Associate Business Management Analyst	4742	Associate Business Management Analyst
Associate Governmental Program Analyst	5393	Associate Governmental Program Analyst
Associate Management Analyst	5246	Associate Management Analyst
Associate Personnel Analyst	5142	Associate Personnel Analyst
Bookbinder II	7402	Bookbinder II
Business Service Officer	4707	Business Service Assistant (Specialist)
	4720	Business Service Officer I (Specialist)
	4973	Business Service Officer II (Supervisor)
Business Taxes Administrator	4335	Business Taxes Administrator I, Board of Equalization

*Board of Equalization Exempt Position – There is no description available for this Job Classification.

Series Specification	Class Codes	Job Classification
	4331	Business Taxes Administrator II, Board of Equalization
	4320	Business Taxes Administrator III, Board of Equalization
Business Taxes Representative/Business Taxes Compliance Supervisor	8690	Business Taxes Representative
	8694	Business Taxes Compliance Specialist
	8698	Business Taxes Compliance Supervisor II
	4426	Business Taxes Compliance Supervisor III
Business Taxes Specialist, Board of Equalization	4380	Business Taxes Specialist I, Board of Equalization
	4379	Business Taxes Specialist II, Board of Equalization
	4378	Business Taxes Specialist III, Board of Equalization
Career Executive Assignment (CEA)	7500	Career Executive Assignment (CEA)
Chief Construction Supervisor	4025	Chief Construction Supervisor
Chief Counsel	5871	Assistant Chief Counsel
	5873	Chief Counsel II, C.E.A.
Computer Operations	1353	Computer Operator
Data Processing Manager	1381	Data Processing Manager I
	1384	Data Processing Manager II
	1393	Date Processing Manager III
	1387	Data Processing Manager IV
Deputy to Board Member	4275	*
Digital Composition Specialist	7255	Digital Composition Specialist I
	7258	Digital Composition Specialist III
Digital Print Operator	1412	Digital Print Operator II
District Office Director	4984	*
Executive Assistant	1728	Executive Assistant
Expert Examiner	8895	Expert Examiner
Forest Property Appraiser	5017	Associate Forest Property Appraiser (Board of Equalization)

*Board of Equalization Exempt Position – There is no description available for this Job Classification.

Series Specification	Class Codes	Job Classification
	5016	Senior Forest Property Appraiser (Board of Equalization)
Graduate Student Assistant	4872	Graduate Student Assistant
Graphic Designer	2886	Graphic Designer III
Hearing Reporter	1229	Hearing Reporter
Information Officer I (Specialist)	5601	Information Officer I (Specialist)
Information Officer II	5595	Information Officer II
Information Systems Analyst	1479	Assistant Information Systems Analyst
	1470	Associate Information Systems Analyst (Specialist)
	1312	Staff Information Systems Analyst (Specialist)
	1337	Senior Information Systems Analyst (Specialist)
	1340	Senior Information Systems Analyst (Supervisor)
Information Systems Technician	1360	Information Systems Technician
	1562	Information Systems Technician Specialist I
	1408	Information Systems Technician Supervisor I
	1407	Information Systems Technician Supervisor II
Key Data Operations	1419	Key Data Operator
	1436	Key Data Supervisor II
	1435	Key Data Supervisor III
Labor Relations	9535	Labor Relations Specialist
Librarian	2951	Librarian
Limited Examination and Appointment Program Candidate (Identified Class)	4687	Limited Examination and Appointment Program Candidate (Identified Class)
Mailing Machines	1779	Mailing Machines Operator I
	1780	Mailing Machines Operator II
	1459	Mailing Machines Supervisor I
Management Services Technician	5278	Management Services Technician
Microfilm Technician	1480	Microfilm Technician I

*Board of Equalization Exempt Position – There is no description available for this Job Classification.

Series Specification	Class Codes	Job Classification
Office Assistant/Technician	1441	Office Assistant (General)
	1379	Office Assistant (Typing)
	1138	Office Technician (General)
	1139	Office Technician (Typing)
Office Services Manager I	1103	Office Services Manager I
Office Services Supervisor	1150	Office Services Supervisor II (General)
	1151	Office Services Supervisor III (General)
Operations Research Specialist III	5260	Operations Research Specialist III
Personnel Specialist	1303	Personnel Specialist
	1317	Senior Personnel Specialist
	1304	Personnel Supervisor I
Personnel Technician	5161	Personnel Technician II (Specialist)
Printing Trades Specialist	1516	Printing Trades Supervisor II (General)
Programmer II	1383	Programmer II
Programmer Analyst	1579	Associate Programmer Analyst (Specialist)
	1581	Staff Programmer Analyst (Specialist)
	1583	Senior Programmer Analyst (Specialist)
	1584	Senior Programmer Analyst (Supervisor)
Proofreader	7265	Proofreader
Property Appraiser (Board of Equalization)	5439	Assistant Property Appraiser (Board of Equalization)
	5441	Assistant Property Auditor Appraiser (Board of Equalization)
	5444	Associate Property Appraiser (Board of Equalization)
	5448	Associate Property Auditor Appraiser (Board of Equalization)
	5449	Senior Specialist Property Appraiser (Board of Equalization)
	5453	Senior Specialist Property Auditor Appraiser (Board of Equalization)
	5454	Supervising Property Appraiser (Board of Equalization)
	5455	Principal Property Appraiser (Board of Equalization)
Property Controller II	1549	Property Controller II

*Board of Equalization Exempt Position – There is no description available for this Job Classification.

Series Specification	Class Codes	Job Classification
Research Analyst	7416	Research Analyst I (Geographic Information Systems)
	7417	Research Analyst II (Geographic Information Systems)
Research Manager	7421	Research Manager I (Geographic Information Systems)
	5737	Research Manager II (General)
Research Program Specialist	5742	Research Program Specialist I
	5758	Research Program Specialist II
	5835	Research Program Specialist II (Economics)
Secretary	1176	Secretary
	1247	Executive Secretary I
	1245	Executive Secretary II
Senior Administrative Analyst (Accounting Systems)	5302	Senior Administrative Analyst (Accounting Systems)
Senior Legal Typist/ Legal Secretary	1282	Legal Secretary
Senior Petroleum and Mining Appraisal Engineer	3483	Senior Petroleum and Mining Appraisal Engineer
Sheetfed Offset Press Operator	7324	Sheetfed Offset Press Operator II
	7327	Sheetfed Offset Press Operator III
Staff Services Analyst (General)	5157	Staff Services Analyst (General)
Staff Services Manager	4800	Staff Services Manager I
	4801	Staff Services Manager II (Supervisory)
	4969	Staff Services Manager II (Managerial)
	4802	Staff Services Manager III
Student Assistant	4870	Student Assistant
Systems Software Specialist	1585	Associate Systems Software Specialist (Technical)
	1587	Systems Software Specialist I (Technical)
	1373	Systems Software Specialist II (Technical)
	1367	Systems Software Specialist III (Technical)
Tax Auditor, Board of Equalization	4267	Tax Auditor, Board of Equalization

*Board of Equalization Exempt Position – There is no description available for this Job Classification.

Series Specification	Class Codes	Job Classification
	4281	Associate Tax Auditor, Board of Equalization
	4280	Supervising Tax Auditor I, Board of Equalization
	4277	Supervising Tax Auditor II, Board of Equalization
	4271	Supervising Tax Auditor III, Board of Equalization
Tax Consultant	9592	*
Tax Counsel	6728	Tax Counsel
	6733	Tax Counsel III (Specialist)
	6734	Tax Counsel III (Supervisor)
	6722	Tax Counsel IV
Tax Service Specialist	5850	Tax Service Specialist
Tax Technician, Board of Equalization	1973	Tax Technician I, Board of Equalization
	1974	Tax Technician II, Board of Equalization
	1975	Tax Technician III, Board of Equalization
	1977	Supervising Tax Technician II, Board of Equalization
	1978	Supervising Tax Technician III, Board of Equalization
Training Officer	5197	Training Officer I
Warehouse Worker	6220	Warehouse Worker
Word Processing Technician	1181	Word Processing Technician
Youth Correctional Counselor	9581	Youth Correctional Counselor

*Board of Equalization Exempt Position – There is no description available for this Job Classification.

SPEC: ACCOUNT CLERK
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

ACCOUNT CLERK
Series Specification
(Established May 19, 1971)

SCOPE

This series specification describes four Account Clerk classes in the California state service which have major responsibilities involved in the keeping or reviewing of financial or statistical records. Classes that perform general office work or that require special proficiency in typing, shorthand, filing, or cashiering have been excluded.

Schem Code	Class Code	Class
CU70	1733	Account Clerk II
CU60	1730	Senior Account Clerk
CU50	1727	Supervising Account Clerk I
CU40	1724	Supervising Account Clerk II

DEFINITION OF SERIES

Account Clerks are distinguished from other clerical classes by being regularly required to perform duties for a significant portion of time involving arithmetic calculations, posting, processing and checking the results and maintaining a set of financial, statistical or other records. Duties include tasks concerned with departmental accounts and funds, personnel records, and work records such as: preparing and checking payrolls and invoices; posting, verifying, balancing, and adjusting accounts; scheduling, indexing, and filing bills, vouchers, documents and other papers; verifying various statistical or accounting tables and reports; keeping subsidiary ledgers; assisting in preparing statistical or accounting reports; and maintaining various financial records requiring the use of independent judgment. Account Clerk II and Senior Account Clerk: may instruct, lead or supervise inmates, wards or resident workers.

FACTORS AFFECTING POSITION ALLOCATION

Level of difficulty, variety, and complexity of assigned duties, independence of action and decisions, degree of supervision received and degree of supervision exercised serve as differentiating factors between individual classes.

DEFINITION OF LEVELS

ACCOUNT CLERK II

This is the entry and journey level for this series. Under general

supervision and in accordance with established procedures, incumbents perform duties concerned with the preparation, processing and maintenance of statistical, financial, or other records; compiles, investigates and verifies from a variety of sources numerical or financial information such as attendance and time distribution, records, payrolls, invoices, expense claims, accounts payable and receivable, and schedules. May have lead responsibility over others.

SENIOR ACCOUNT CLERK

Under general supervision, performs duties concerned with the processing and maintenance of difficult or complex statistical or financial records which require originality, initiative, judgment and a broad knowledge and understanding of departmental record procedures. May have lead responsibility over others.

SUPERVISING ACCOUNT CLERK I

This is the first full supervisory level. Incumbents supervise and assist with the work of a group of approximately five to fifteen employees engaged in financial clerical work of average difficulty, or supervise the work of a larger group engaged in less difficult work, or a smaller group engaged in more difficult work requiring a high degree of initiative, judgment, and responsibility on the part of the supervisor.

SUPERVISING ACCOUNT CLERK II

This is the second level of supervision in this series. Incumbents direct the work of a group of approximately fifteen to twenty-five employees engaged in financial clerical work of average difficulty, or supervise the work of a larger group engaged in less difficult work, or supervise a smaller group engaged in more difficult work requiring a high degree of initiative, judgment, and responsibility on the part of the supervisor.

MINIMUM QUALIFICATIONS

ACCOUNT CLERK II

Either I

One year of experience in California state service in keeping or reviewing financial or statistical records.

Or II

One year of experience in keeping or reviewing financial or statistical records. (Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience.) (Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.)

SENIOR ACCOUNT CLERK

Either I

Two years of experience in California state service performing the duties of an Account Clerk II.

Or II

Three years of experience in keeping or reviewing financial or statistical records. (Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience.) (Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.)

SUPERVISING ACCOUNT CLERK I

Either I

One year of experience in California state service performing the duties of a Senior Account Clerk.

Or II

Four years of experience in financial record-keeping work, at least one year of which shall have been in a responsible position performing a variety of difficult account or record-keeping work, or supervising the work of a small group of clerical employees involved in account or record-keeping work. (Experience in California state service applied toward the specialized one-year requirement must be performing the duties of a class at a level of responsibility equivalent to that of Senior Account Clerk.) (Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience.) (Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.)

SUPERVISING ACCOUNT CLERK II

Either I

One year of experience in California state service performing the duties of a Supervising Account Clerk I, or two years of experience performing the duties of a Senior Account Clerk.

Or II

Five years of experience in financial record keeping, at least two years of which shall have been in a responsible supervisory capacity. (Experience in California state service applied toward the specialized two-year requirement must be performing the duties of a class at a level of responsibility equivalent to that of Senior Account Clerk.) (Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to

three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience.) (Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Modern office methods, supplies and equipment.

Ability to: Read and write English at a level required for successful job performance; perform financial and statistical clerical work; spell correctly, use good English, and make rapid and accurate arithmetical computations.

SENIOR ACCOUNT CLERK AND ABOVE

Knowledge of: In addition to the above, Business English and correspondence; methods, practices and terminology used in financial and statistical record-keeping work.

SUPERVISING ACCOUNT CLERK I
SUPERVISING ACCOUNT CLERK II

Knowledge of: In addition to the above, principles of effective supervision and training; the department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: In addition to the above, plan, organize, and direct the work of a large clerical staff; establish and revise financial record-keeping systems; prepare reports, keep difficult records, and prepare correspondence independently, utilizing a wide knowledge of vocabulary, grammar, and spelling; learn rapidly and apply specific laws, rules, and office policies and procedures; speak and write effectively; analyze situations accurately and take effective action; meet and deal tactfully with the public; follow oral and written directions; effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTICS

ACCOUNT CLERK II

Willingness to follow a prescribed routine; tact; neat personal appearance; and liking for work involving arithmetical calculations.

SENIOR ACCOUNT CLERK AND ABOVE

A demonstrated interest in assuming increasing responsibility.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

Education equivalent to completion of the twelfth grade.

ACCOUNT CLERK II

Ability to operate a typewriter and calculating machine; and to postdate rapidly, accurately, and legibly.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Account Clerk II	3/12/31	7/11/79	9/22/67
Senior Account Clerk	1/9/31	8/7/80	--
Supervising Account Clerk I	1931	5/9/79	--
Supervising Account Clerk II	7/9/31	5/9/79	--

SPEC: ACCOUNTING ADMINISTRATOR SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

ACCOUNTING ADMINISTRATOR
Series Specification
(Established April 8, 1986)

SCOPE

This series specification describes four accounting classes used in State service.

Schem Code	Class Code	Class
JL16	4552	Accounting Administrator I (Specialist)
JL14	4549	Accounting Administrator I (Supervisor)
JL12	4542	Accounting Administrator II
JL10	4545	Accounting Administrator III

DEFINITION OF SERIES

This series specification describes the work performed by four professional accounting classes used throughout State service that perform as a department's Chief Accounting Officer or as accounting section managers. They function in either a direct or supporting role in a department and are responsible for providing the accounting and fiscal data needed to meet a department's program objectives.

Incumbents in these high level positions require the possession of an accounting background and demonstration of communication skills and administrative or supervisory abilities. They must also have the personal qualifications necessary to succeed in supervising accounting activities and personnel.

Specialist positions within this series are nonsupervisory and perform the most complex professional accounting work assigned to that level.

Supervisory and managerial accounting administrators plan, direct and evaluate the work of an accounting office, group, unit, or program.

ENTRY LEVELS

Entry into this series is typically from the Senior Accounting Officer (either designation), Associate Accounting Analyst, or Associate Administrative Analyst (Accounting Systems) classifications.

FACTORS AFFECTING POSITION ALLOCATION

The nature and scope of administrative responsibility, leadership or supervision exercised, reporting relationship, variety and complexity of accounting function, size of accounting office, and impact of

decisions.

DEFINITION OF LEVELS

ACCOUNTING ADMINISTRATOR I (SPECIALIST)

This is the nonsupervisory level in the series. Positions at this level perform as staff specialists assisting the highest level administrator (in, at a minimum, a large-complex or very large-standard accounting office) with responsibility for the completion of highly complex fiscal activities having multifunctional and/or multigeographical impact.

Incumbents at this level have no supervisory responsibility, but may serve as a lead to other professional accounting staff.

ACCOUNTING ADMINISTRATOR I (SUPERVISOR)

Positions at this level supervise a group of professional or analytical and semiprofessional accounting staff performing accounting or accounting and budgetary work and directing a variety of specialized or central control fiscal activities. This level, under general supervision, either: (1) performs as the Chief Accounting Officer in a medium-standard accounting office; or (2) performs as a sectional manager reporting to the Chief Accounting Officer in a medium-complex accounting office.

ACCOUNTING ADMINISTRATOR II

This is the full supervisory level in the series where the majority of the time is spent on administrative and supervisory activities. Positions at this level supervise a group of professional or analytical and semiprofessional accounting staff performing accounting and other fiscal related work or direct a variety of specialized or central control fiscal activities, typically through subordinate supervisors at the Accounting Administrator I (Supervisor) level.

This level, under general direction, either: (1) performs as the Chief Accounting Officer in a medium-complex or large-standard accounting office; or (2) performs as a multisection supervisor in a large-complex accounting office; or (3) performs as a sectional manager in a very large-complex accounting office.

ACCOUNTING ADMINISTRATOR III

This is the management level in the series with predominantly administrative responsibility. Positions at this level, under administrative direction, have charge of a large and complex accounting function which requires subordinate supervisors at the Accounting Administrator II level or direct an accounting program involving the development and administration of statewide accounting plans, policies, procedures, and standards. This level either: (1) performs as the Chief Accounting Officer in a large-complex or very large-standard accounting office; or (2) performs as a multisection manager in a very large- complex accounting office.

MINIMUM QUALIFICATIONS

ACCOUNTING ADMINISTRATOR I (SPECIALIST)

Either I

One year of experience in the California state service performing the duties of a professional accounting class equivalent in level to Senior Accounting Officer (Supervisor), Senior Accounting Officer (Specialist), Associate Accounting Analyst, or Associate Administrative Analyst (Accounting Systems).

Or II

Experience: Four years of increasingly responsible professional accounting or auditing experience. [Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Senior Accounting Officer (Supervisor) or (Specialist).] (Experience in the California state service may be applied toward the total experience requirement on a proportional basis.) and

Education: Either:

1. Equivalent to graduation from college, with specialization in accounting; or

2. Completion of the equivalent of 45 semester units given by a collegiate-grade residence or correspondence institution, of which 24 units must include courses in financial accounting, managerial accounting, intermediate/advanced accounting, fund/governmental accounting, cost accounting, auditing, business law, computer applications/management information systems. (Persons who will complete course work requirements during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment.)

ACCOUNTING ADMINISTRATOR I (SUPERVISOR)

Either I

One year of experience in the California state service performing the duties of a professional accounting class equivalent in level to Senior Accounting Officer (Supervisor), Senior Accounting Officer (Specialist), Associate Accounting Analyst, or Associate Administrative Analyst (Accounting Systems).

Or II

Experience: Four years of increasingly responsible professional accounting or auditing experience. For at least one year, this responsibility must have been at a level equivalent to supervising a staff in the operation of a complex accounting system. [Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Senior Accounting Officer (Supervisor) or (Specialist).] (Experience in the California state service may be applied toward the total experience requirement on a proportional basis.) and

Education: Either:

1. Equivalent to graduation from college, with specialization in accounting; or

2. Completion of the equivalent of 45 semester units given by a collegiate-grade residence or correspondence institution, of which 24 units must include courses in financial accounting, managerial accounting, intermediate/advanced accounting, fund/governmental accounting cost accounting, auditing, business law, computer applications/management information systems. (Persons who will complete course work requirements during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment.)

ACCOUNTING ADMINISTRATOR II

Either I

One year of experience in the California state service performing the duties of a professional accounting or auditing class equivalent in level to Accounting Administrator I (Specialist) or Accounting Administrator I (Supervisor).

Or II

Experience: Five years of increasingly responsible professional accounting or auditing experience. For at least one year, this responsibility must have been at a level equivalent to supervising a staff in the operation of a complex accounting system. [Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Accounting Administrator I (Specialist) or Accounting Administrator I (Supervisor).] (Experience in the California state service may be applied toward the total experience requirement on a proportional basis.) and

Education: Same as Accounting Administrator I (Specialist) or Accounting Administrator I (Supervisor).

ACCOUNTING ADMINISTRATOR III

Either I

One year of experience in the California state service performing the duties of an Accounting Administrator II.

Or II

Two years of experience in the California state service performing the duties of a professional accounting or auditing class equivalent in level to Accounting Administrator I (Specialist) or Accounting Administrator I (Supervisor) at least one year of which shall have been in a supervisory assignment.

Or III

Experience: Broad and extensive experience (more than five years) of increasingly responsible professional accounting or auditing experience. For at least two years, this responsibility must have been at a level equivalent to supervising a staff in the operation of a complex accounting system. (Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Accounting Administrator II.) (Experience in

the California state service may be applied toward the total experience requirement on a proportional basis.) and

Education: Same as Accounting Administrator I (Specialist) or Accounting Administrator I (Supervisor).

KNOWLEDGE AND ABILITIES

ACCOUNTING ADMINISTRATOR I (SPECIALIST)

Knowledge of: Accounting principles and procedures; governmental accounting and budgeting; the uniform accounting system and financial organization and procedures of the State of California and related laws, rules, and regulations; principles of business management, including office methods and procedures; principles of public finance; and business law.

Ability to: Apply accounting principles and procedures; analyze data and draw sound conclusions; analyze situations accurately and adopt an effective course of action; prepare clear, complete, and concise reports; make sound decisions and recommendations in regard to the professional accounting problems in maintaining control of a departmental budget; establish and maintain cooperative relations with those contacted in the work; and speak and write effectively.

ACCOUNTING ADMINISTRATOR I (SUPERVISOR)
ACCOUNTING ADMINISTRATOR II
ACCOUNTING ADMINISTRATOR III

Knowledge of: All of the above, and principles and techniques of personnel management and supervision; and planning, organizing, and directing the work of others; the department's Affirmative Action Program objectives; and a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and plan, organize, and direct the work of others; and effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTIC

ALL LEVELS:

Ability to qualify for a fidelity bond.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

Preferred additional education includes courses in statistics, business finance, mathematics, college composition, speech/oral communications and/or business composition.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Accounting Administrator I (Specialist)	4/8/86	--	--
Accounting Administrator II (Supervisor)	7/1/44	4/8/86	4/8/86
Accounting Administrator II	6/15/37	4/8/86	9/1/71
Accounting Administrator III	4/8/86	--	--

SPEC: ACCOUNTING ANALYST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

ACCOUNTING ANALYST
Series Specification
(Established July 11, 1984)

SCOPE

This series specification describes two classes used to perform analytical, forecasting, planning and/or advisory duties in the area of accounting. Positions are typically located in a departmental accounting office or in a central fiscal control setting.

Accounting Analysts perform such duties as analyzing a variety of accounting data to assist in the application of financial data and information to management problems; providing estimates of expenditures, reimbursements and revenues; advising management of forecasted expenditures relative to budgeted expenditures; forecasting, determining and managing necessary cash flow to support financial operations; identifying significant trends and making comparisons to previous accounting periods; analyzing and maintaining accounting controls required by the Controller's centralized control accounting system; evaluating and maintaining internal controls; establishing and maintaining liaison with operating managers to ascertain their need for accounting data, to identify changes in the operating programs which affect the accounting operation, to identify possible ways of using accounting data for management purposes and encourage a greater use of accounting data, and to actively participate in decision- and policy-making sessions; gathering data and making studies on various problems arising in connection with financial administration; diagnosing accounting and EDP-related system problems as they relate to the accomplishment of accounting objectives; developing a process to gather year-end accrual information and analyzing year-end accruals for conformance with a legal basis and Generally Accepted Accounting Principles (GAAP); designing and installing new or revised systems and procedures in the accounting office; analyzing and proposing legislation which requires modification of the accounting system; and other related work. In addition to performing analytical and advisory duties of the nature described above, Accounting Analysts may also be assigned complex technical, professional accounting responsibilities related to the establishment, maintenance and reporting of accounting records, such as establishing new accounts, monitoring fund balances, analyzing appropriateness of transactions, approving expenditures, certifying availability of funds, preparing financial statements in conformance with both a legal basis and Generally Accepted Accounting Principles (GAAP), and other related work. Positions which have as their primary responsibility the performance of technical, professional accounting duties, related to the establishment, maintenance and reporting of accounting records should be allocated to the Accounting Officer series. Positions which have as their primary responsibility the study and implementation of new or revised accounting systems should be allocated to the Administrative Analyst (Accounting Systems) series.

Schem Code	Class Code	Class
JM12	4582	Accounting Analyst
JM10	4588	Associate Accounting Analyst

ENTRY LEVELS

Entry into this series is typically through the class of Accounting Analyst.

DEFINITION OF LEVELS

ACCOUNTING ANALYST

This is the recruiting, developmental and first journey level class in this series, for persons qualified to perform analytical, forecasting, planning and/or advisory duties in the area of accounting.

ASSOCIATE ACCOUNTING ANALYST

This is the full journey level, requiring independence and proficiency in handling complex and difficult assignments. Incumbents may serve as leadpersons but are not responsible for the direct supervision of other Accounting Analysts or other accounting staff.

MINIMUM QUALIFICATIONS

ACCOUNTING ANALYST

Education Requirement:

Either I

Equivalent to graduation from college with a specialization in accounting. (Registration as a senior student in a recognized institution will admit applicants to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment.)

Or II

Completion of the equivalent of 45 semester units given by a collegiate-grade residence or correspondence institution, of which 24 units must include courses in financial accounting, managerial accounting, first semester intermediate accounting and advanced accounting (or second semester intermediate accounting), fund/governmental accounting, cost accounting, auditing, business law, computer applications/management information systems. (Persons who will complete course work requirements during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment.)

ASSOCIATE ACCOUNTING ANALYST

Education Requirement:

Completion of the education requirement described above under Accounting Analyst.

Experience Requirement:

Either I

One year of experience in the California state service performing accounting analyst, professional accounting, accounting systems or auditing duties at a level of responsibility equivalent to Accounting Analyst, Range C.

Or II

Three years of increasingly responsible accounting analyst, professional accounting, accounting systems or auditing experience in a governmental or private setting. (Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Accounting Analyst, Range C.)

Promotional candidates who have completed the education requirement and who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.

KNOWLEDGE AND ABILITIES

ACCOUNTING ANALYST

Knowledge of: Accounting principles and procedures; governmental accounting and budgeting; principles of electronic data processing; principles of policy formulation; statistical methods; principles of finance; business law; principles of business management.

Ability to: Apply accounting principles and practices; analyze data and draw sound conclusions; analyze situations accurately and adopt an effective course of action; prepare clear, comprehensive, and concise reports; apply principles of finance and develop financial policy; apply statistical methods; analyze a variety of accounting data; identify trends, make projections, and draw conclusions; make sound decisions and recommendations with regard to accounting problems; work closely with operating managers to identify accounting office capabilities as they apply to a variety of program needs; establish and maintain cooperative relations with those contacted in the work; interpret and apply laws, rules, standards and procedures; and communicate effectively.

ASSOCIATE ACCOUNTING ANALYST

Knowledge of: All of the above, and the uniform accounting system and the financial organization and procedures of the State of California, policies, rules, and regulations of the Legislature, State Controller, State Treasurer, Department of Finance, and central control agencies as they relate to State agency financial management activities.

Ability to: All of the above.

SPECIAL PERSONAL CHARACTERISTIC

ALL LEVELS:

Ability to qualify for a fidelity bond.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

Preferred additional education includes courses in statistics, business finance, mathematics, college composition, speech/oral communications and/or business composition.

ALTERNATE RANGE CRITERIA

ACCOUNTING ANALYST

Range A. This range shall apply to incumbents who do not meet the criteria for payment in any other range.

Range B. This range shall apply to incumbents who have satisfactorily completed the equivalent of six months of Accounting Analyst, Accountant Trainee, Accountant I (Specialist), or Accountant I (Supervisor) experience, or who have the equivalent of six months of satisfactory experience outside of State service performing duties similar to those of an Accounting Analyst.

Range C. This range shall apply to incumbents who have satisfactorily completed the equivalent of 12 months of Accounting Analyst, Range B, experience and to persons who have the equivalent of 18 months of satisfactory experience outside State service performing duties similar to those of an Accounting Analyst.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Accounting Analyst	7/11/84	--	--
Associate Accounting Analyst	7/11/84	--	--

SPEC: ACCOUNTING OFFICER
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

ACCOUNTING OFFICER
Series Specification
(Established September 1, 1971)

SCOPE

This series specification describes five accounting classes used in State service.

Schem Code	Class Code	Class
JL35	4179	Accountant Trainee
JL26	4546	Accounting Officer (Specialist)
JL24	4563	Accounting Officer (Supervisor)
JL22	4567	Senior Accounting Officer (Specialist)
JL20	4569	Senior Accounting Officer (Supervisor)

DEFINITION OF SERIES

The Accounting Officer series describes the work performed by professional accountants. Incumbents in these classes perform professional accounting duties. A professional accountant typically has responsibility for maintaining accounting records for organizational units, and may have budgetary and/or business management control; exercises central fiscal control activities; prepares, reviews and analyzes all types of accounts and records of financial transactions; and does other related work.

Specialist positions within this series are nonsupervisory and perform the professional accounting work assigned to that level.

Supervisory accounting officers plan, direct and evaluate the work of an accounting group, unit, or program.

DISTINGUISHING CHARACTERISTICS

A. Positions which have as their primary responsibility the making of analytical studies of accounting systems and the formulation of new or revised systems to meet accounting needs should be allocated to the Administrative Analyst (Accounting Systems) series.

B. Positions which involve performance, on a regular basis, of analytical, forecasting, planning and/or advisory duties in the area of accounting should be allocated to the classes of Accounting Analyst or Associate Accounting Analyst.

C. Positions which function as the highest administrative position within an accounting office, and serve as part of the management structure of a department in either a direct or supporting role, responsible for providing the accounting and fiscal data needed to

meet a department's program objectives should be allocated to the Accounting Administrator series.

ENTRY LEVELS

Entry into this series is typically at the class of Accountant Trainee. Positions assigned semiprofessional accounting duties not requiring the completion of a professional accounting curriculum are allocated to the classes of Accountant I or Accounting Technician.

FACTORS AFFECTING POSITION ALLOCATION

Level, variety and complexity of work; size of accounting office; number of professional, semiprofessional and clerical personnel supervised; supervision received/independence of action; number and complexity of type of funds (governmental, proprietary, and fiduciary); number of funds and appropriations; and other functional responsibilities.

DEFINITION OF LEVELS

ACCOUNTANT TRAINEE

This is the entry and trainee level in the professional accounting series. Under close supervision from a higher level professional accountant, as a learner, incumbents perform professional accounting work in the establishment and maintenance of accounts and records while receiving training; learn agency activities, departmental systems, and central fiscal control activities; and develop interpersonal skills by contact with program personnel and control agencies in fiscal control activities.

ACCOUNTING OFFICER (SPECIALIST)

This is the first journeyperson level for the series. Incumbents, under general supervision from a Senior Accounting Officer or an Accounting Administrator, perform professional accounting duties of average difficulty in the establishment and maintenance of accounts and financial records for agency activities, such as maintain accounting records for funds administered by the department; prepare, review and analyze financial reports, statements, accounts and records; maintain the General Ledgers; reconcile the General Ledger to SCO; review expenditures against allotments. Incumbents may exercise moderate control in the administration of established policies and procedures, and may have on-going contacts with program managers, control agencies, local governmental jurisdictions, Federal Government, vendors, and members of the public.

Incumbents in this class have no supervisory responsibilities, but may serve as a lead for Accountant Trainees, accounting clerical and semiprofessional personnel.

ACCOUNTING OFFICER (SUPERVISOR)

This is the first supervisory level in the series. Incumbents, under

general supervision of a Senior Accounting Officer (Supervisor) or an Accounting Administrator, are responsible for coordination and supervision of a group of semiprofessional and/or clerical subordinates in the maintenance and reporting of accounting or fiscal activities, such as posting of journals and ledgers, cost accumulation reports, and claim schedules; may have on-going contacts with program managers, control agencies, local governmental jurisdictions, Federal Government, vendors, and members of the public.

SENIOR ACCOUNTING OFFICER (SPECIALIST)

This is the second journeyperson level in the series. Incumbents, under general direction of an Accounting Administrator, independently perform the more difficult accounting duties which require an understanding of the entire accounting process, such as coordinate implementation of accounting for new programs/functions; review proposals to change accounting procedures; prepare cash analysis reports for management; coordinate completion of year-end reports. Assignments at this level may involve responsibilities which impact the entire accounting operation and may be given broad discretion in the solution of problems.

Incumbents may have considerable contact with the accounting administrators or the chief accounting officer for the department, departmental management, budget section, State control agencies.

Incumbents in this class have no supervisory responsibilities, but may serve as a lead for lower level accounting personnel.

SENIOR ACCOUNTING OFFICER (SUPERVISOR)

This is the second supervisory level in the series. Incumbents, under general direction, are responsible for the coordination and supervision of subordinate professional, technical and clerical accounting staff in the maintenance and reporting of accounting and/or fiscal activities, and either:

1. Functions as the Chief Accounting Officer in a small accounting office with responsibility for the entire fiscal or accounting function; or

2. Functions as a sectional supervisor in an operational and/or financial setting.

Incumbents are expected to possess a broad knowledge of the State's accounting system and professional accounting and thus receive limited technical direction from their manager. They may have considerable contact with field units, EDP, budget section, auditors, program managers, control agencies, vendors, "clients" of specialized programs administered by the department, local and/or Federal Government.

MINIMUM QUALIFICATIONS

ACCOUNTANT TRAINEE

Education:

Either I

Equivalent to graduation from college, with specialization in accounting. (Registration as a Senior Student in a recognized institution will admit applicants to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment.)

Or II

Completion of a prescribed professional accounting curriculum given by a residence or correspondence school of accountancy, including courses in elementary and advanced accounting, auditing, cost accounting and business law.

Or III

Completion of the equivalent of 19 semester hours of course work; 16 hours of which shall be professional accounting courses given by a collegiate-grade residence institution, including courses in elementary and advanced accounting, auditing, and cost accounting; and three semester hours of business law.

(Persons who will complete work requirements outlined under II and III above during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment.)

ACCOUNTING OFFICER (SPECIALIST)
ACCOUNTING OFFICER (SUPERVISOR)

Either I

One year of experience in the California state service performing professional accounting or auditing duties of a class with a level of responsibility not less than that of Accountant Trainee or Auditor I. (Applicants meeting the educational requirements who have completed six months of service performing professional accounting or auditing duties of a class with a level of responsibility not less than that of Accountant Trainee or Auditor I will be admitted to the examination, but they must satisfactorily complete one year of this experience before they can be considered eligible for appointment.)

Or II

Experience: One year in the California state service performing the duties of an Accountant I (Specialist) or Accountant I (Supervisor). Applicants meeting the educational requirements who have completed six months of service performing the duties of an Accountant I (Specialist) or Accountant I (Supervisor) will be admitted to the examination, but they must satisfactorily complete one year of this experience before they can be considered eligible for appointment. and

Education: Same as Accountant Trainee.

Or III

Experience: Two years of increasingly responsible professional accounting or auditing experience. (Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Accountant I.) (Experience in the California state service may be applied toward the total experience requirement on a proportional basis.) and

Education: Same as Accountant Trainee.

SENIOR ACCOUNTING OFFICER (SPECIALIST)

Either I

One year of experience in the California state service performing the duties of a professional accounting class equivalent in level to Accounting Officer (Specialist) or Accounting Officer (Supervisor).

Or II

Experience: Three years of increasingly responsible professional accounting or auditing experience in a governmental or private setting. For at least one year, this responsibility must have included the reporting and analyses of accounts, records, funds and financial operations of the entity. [Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Accounting Officer (Specialist) or Accounting Officer (Supervisor).] and

Education: Same as Accountant Trainee.

SENIOR ACCOUNTING OFFICER (SUPERVISOR)

Either I

One year of experience in the California state service performing the duties of a professional accounting class equivalent in level to Accounting Officer (Supervisor) or Accounting Officer (Specialist).

Or II

Experience: Three years of increasingly responsible professional accounting or auditing experience. For at least one year, this responsibility must have been at a level equivalent to supervising a staff in the operation of small- or medium-sized accounting system. [Experience in the California state service applied toward this requirement must include at least one year performing the duties of a class at a level of responsibility not less than that of Accounting Officer (Supervisor).] and

Education: Same as Accountant Trainee.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Accounting principles and procedures; governmental accounting and budgeting; the uniform accounting system and financial organization and procedures of the State of California and related laws, rules, and regulations; principles of business management, including office methods and procedures; principles of public finance; business law.

Ability to: Apply accounting principles and procedures; analyze data and draw sound conclusions; analyze situations accurately and adopt an effective course of action; prepare clear, complete, and concise reports; make sound decisions and recommendations in regard to the professional accounting problems in maintaining control of a departmental budget; establish and maintain cooperative relations with those contacted in the work; and speak and write effectively.

ACCOUNTING OFFICER (SUPERVISOR)
SENIOR ACCOUNTING OFFICER (SUPERVISOR)

Knowledge of: All of the above, and principles and techniques of personnel management and supervision; and planning, organizing, and directing the work of others; the department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and plan, organize, and direct the work of others; effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTIC

ALL LEVELS:

Ability to qualify for a fidelity bond.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Accountant Trainee	9/11/64	9/20/88	--
Accounting Officer (Specialist)	8/7/80	9/20/88	--
Accounting Officer (Supervisor)	8/7/80	9/20/88	--
Senior Accounting Officer (Specialist)	8/7/80	9/20/88	--
Senior Accounting Officer (Supervisor)	8/7/80	9/20/88	--

SPEC: ADMINISTRATIVE ASSISTANT II
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	KG30
Class Code:	5358
Established:	12/5/47
Revised:	1/19/77
Title Changed:	2/2/51

ADMINISTRATIVE ASSISTANT II

DEFINITION

Under general direction, to assist an administrator by performing varied administrative duties of a high degree of responsibility; and to do other related work.

DISTINGUISHING CHARACTERISTICS

Employees in this class are normally responsible for relieving a director, deputy director, or head of a large operating unit, of administrative detail. They serve to increase the capacity of the administrator to carry out the duties and responsibilities of his/her position and are to be considered as an augmentation of the administrator rather than a separate entity in the organization of the agency.

Employees in this class are delegated a high degree of responsibility for making recommendations to the administrator involving broad areas of policy formulation or complex administrative action and often are responsible for effecting such recommendations.

Employees in the class of Administrative Assistant I are responsible for obtaining facts on which an administrator may base his/her decisions and for making recommendations that are concerned chiefly with specific cases.

Administrative Assistants are distinguished from the Secretary classes in that although the Secretary classes occasionally perform some of the less responsible Administrative Assistant tasks, the primary emphasis of the Secretary classes is the performance of such clerical tasks as screening phone calls and visitors, scheduling appointments, and taking and transcribing minutes of meetings.

TYPICAL TASKS

Assists and advises a chief administrator and relieves him/her of administrative detail; consults with and interprets matters of policy to the operating divisions; studies and reviews the activities of the departmental programs to determine conformance with administrative policy and develops criteria for evaluating the effectiveness of departmental programs; assists department and

division heads on administrative problems and procedure; makes special studies and investigations and prepares administrative reports; assists in the installation of new programs and procedures; cooperates with other agencies, groups, and individuals in connection with the coordination of departmental activities; studies proposed legislation and advises the administrator regarding its possible effect on departmental programs; confers with other staff members in regard to the need for legislation and reports such need to the administrator; represents the department at conferences, meetings, and legislative hearings; may supervise and review the work of the staff of the administrator's immediate office; prepares articles for publication; addresses interested groups; dictates correspondence and prepares reports.

MINIMUM QUALIFICATIONS

Either I

One year of experience in the California state service performing staff work in a class equivalent in level to Administrative Assistant I.

Or II

Eighteen months of experience in the California state service performing the duties of an Executive Secretary II.

Or III

Experience: Three years of progressively responsible experience in one or a combination of the following:

1. Relieving an administrator of assigned administrative detail and preparing reports and/or recommendations for administrative action. (Experience in California state service must be in a class equivalent in level of responsibility to Office Services Supervisor I.)

2. Professional or technical experience in a field usually requiring an education of collegiate grade and involving duties and responsibilities which develop a wide knowledge of the field of management, at least two years of which shall have involved the independent development of administrative recommendations.

(Possession of a Master's Degree in Public, Personnel, or Business Administration or related field may be substituted for one year of the required experience.)
and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for four years of the required education on a year-for-year basis. Any work experience gained in State service may be used to meet the education requirement on a year-for-year basis.)

(In appraising experience, more weight will be given to the breadth of experience and the evidence of the candidate's ability to accept and fulfill increasing responsibility than to the length of his/her experience.)

KNOWLEDGE AND ABILITIES

Knowledge of: Principles, problems, and methods of public and

business administration, including organization and personnel and fiscal management; office management principles, methods, and procedures; administrative survey techniques and skill in their application; statistical and research methods.

Ability to: Think clearly and quickly and analyze and solve problems of organization and management; work independently in identifying the need for and developing proposed changes to operating practices, programs, and policies; supervise the staff of an administrative office; establish and maintain cooperative working relationships; speak and write effectively.

SPECIAL PERSONAL CHARACTERISTICS

Demonstrated capacity for assuming increasing responsibility, originality, open-mindedness, and tact.

SPEC: ASSISTANT CLERK
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	CA73
Class Code:	1123
Established:	7/26/73
Revised:	--
Title Changed:	--

ASSISTANT CLERK

DEFINITION

Under detailed supervision, to learn and perform simple clerical work and to prepare for advancement by participating in on-the-job training and development; and to do other related work.

JOB CHARACTERISTICS

Assistant Clerk is a recruiting and training class for person who desire to prepare for careers in the various clerical occupations in State service. An employee in this class performs necessary and productive work under detailed supervision while receiving comprehensive on-the-job training in clerical skills and in the clerical practices of the agency. Because this is a training class, incumbents must periodically demonstrate acceptable progress toward higher levels in order to continue their employment in the class. Failure to promote to the Office Assistant I level within a 30-month period will be considered evidence of unsatisfactory progress.

TYPICAL TASKS

Receives, time stamps, sorts, distributes, and batches mail addresses, stuffs, and stamps envelopes; following specific instructions, in some positions, may type form letters, rough draft material, and complete item on various forms and documents; posts to and keeps simple records; make and checks simple arithmetic computations; following detailed instructions, assists in the preparation of reports and statistical summaries; may operate duplicating machines and other office equipment; procures, stores and distributes office supplies; files material in established file according to specified procedures; assists in maintaining card indexes and mailing lists; provides messenger services; relieves receptionist and telephone operator; may take and transcribe dictation in some positions.

ABILITIES

Ability to: Learn and perform simple clerical work including the ability to spell correctly, use good English and make arithmetical computations; follow oral and written directions.

SPECIAL PERSONAL CHARACTERISTICS

Neatness and willingness to follow a prescribed routine and to participate in training necessary to prepare for advancement to the Office Assistant I level.

SPEC: ASSISTANT TAX SERVICE SPECIALIST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LZ33
Class Code:	5692
Established:	5/31/83
Revised:	--
Title Changed:	--

ASSISTANT TAX SERVICE SPECIALIST

DEFINITION

Under direction, to assist a Tax Service Specialist with a program of providing accurate and understandable information to the public concerning the tax laws, rules, and regulations administered by a tax agency; and to do other related work.

TYPICAL TASKS

Prepares articles and other material to explain technical, legal or legislative matters to the general public in an easy-to-understand manner; prepares, coordinates, or works with line personnel in the preparation of a wide variety of communication devices including news releases, trade journals or pamphlets, magazine articles, departmental publications, forms, reports, speeches, and radio, television and motion picture scripts; assists in editing written material including the annual report; recommends methods and techniques for accomplishing the objectives and goals of communication programs to which assigned; evaluates the effectiveness of communication programs and recommends changes; assists in developing and maintaining maximum community understanding of the necessity for compliance in a self-assessed tax program; cooperates with Federal agencies; provides tax information to attorneys, accountants, and other practitioners to help improve the quality of client service; prepares material adapted to the needs and interests of various groups concerned with tax compliances; promotes the knowledge and use of tax services; assists in coordinating the communications and education activities of field and headquarters staff; establishes and maintains cooperative working relations with those engaged in communications media; funnels pertinent information from outside sources into communication channels; prepares replies to difficult and complicated correspondence, including letters for signature by superiors.

MINIMUM QUALIFICATIONS

Experience: Either

1. Two years of experience communicating financial information to the public. or

2. Four years of experience in writing, reporting or editing for a newspaper, news service, radio or television station or in a position having major duties in the area of public relations or public information and involving communicating to the public. This experience must have developed the ability to be responsible for the conduct of a comprehensive public information program for a State agency. Writing experience, while an integral part of the above requirements, will not be considered qualifying in itself. (Experience in the California state service applied toward this requirement must have included at least one year performing the duties of a class at a level of responsibility equivalent to that of Assistant Information Officer.)

and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: Process of translating complex tax laws, rules, and regulations into lay terms; methods used to determine public needs for facts and guidance; methods of editing publications and forms; communications channels, methods, and procedures; California state revenue and taxation programs.

Ability to: Encourage proper compliance with tax laws; anticipate industry-wide tax problems and stimulate the development of answers and their dissemination to the public; develop new and imaginative approaches in organizing and directing major segments of a statewide communications and education program; communicate effectively; establish and maintain cooperative relations with the press and tax practitioners; organize and lay out printed materials; analyze situations accurately and take effective action.

SPECIAL PERSONAL CHARACTERISTICS

Ability to represent taxpayer interest in a technically oriented organization; demonstrated capacity for assuming progressively greater responsibility; emotional stability under stress; recognition of the public's need for assistance in understanding complex taxation procedures, and to effectively present tax agency policies to the public; ability to gain the confidence and respect of those contacted in the work.

SPEC: ASSOCIATE ADMINISTRATIVE ANALYST (ACCOUNTING SYSTEMS)
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	JM36
Class Code:	5304
Established:	1/18/52
Revised:	12/1/66
Title Changed:	--

ASSOCIATE ADMINISTRATIVE ANALYST (ACCOUNTING SYSTEMS)

DEFINITION

Under general direction, to make studies of the accounting systems and financial organization, policies, procedures, and practices of State agencies and to prepare reports containing recommendations; to provide consultative service to State agencies; and to do other related work.

TYPICAL TASKS

Makes major analytical studies of the accounting systems of large and complex State agencies; formulates new or revised systems to meet accounting needs; analyzes the application of office machines and other equipment to specific operations; studies costs and formulates unit cost data as necessary to implement surveys; analyzes work flow and layout; establishes standards for the evaluation of work output; evaluates existing and proposed financial organization, policies, and procedures; prepares factual reports with recommendations based on studies and surveys; prepares manuals of accounting procedures and guides and assists in the installation of new procedures and systems; advises agency officials on accounting and fiscal problems; analyzes budget requests and makes recommendations on their necessity and feasibility; does research on legislation pertaining to fiscal matters and revises accounting procedures to conform; interviews and consults with departmental officials and officers of outside agencies; may supervise and give advice to administrative analysts on lower levels; and dictates correspondence.

MINIMUM QUALIFICATIONS

Either I

One year of experience in the California state service performing duties comparable to those of an Assistant Administrative Analyst (Accounting Systems).

Or II

Experience: Three years of increasingly responsible technical experience in governmental, commercial, or public accounting performing any one or a combination of the following types of work:

1. Development and installation of varied accounting systems. or

2. Preparation of comprehensive and complex financial statements and tax returns. or

3. Directing or assisting in the direction of the accounting and budgetary work of a business concern or governmental agency. or
4. Analytical and critical examination of financial records and books of accounts of business concerns or governmental agencies.

[At least one year of the qualifying experience shall have been equivalent in level to an Assistant Administrative Analyst (Accounting Systems) in the California state service. In the evaluation of experience, greater weight will be given to experience in the full-time development and installation of accounting systems.]

and

Education: Either

1. Equivalent to graduation from college, with specialization in accounting. or

2. Completion of either:

   a. A prescribed professional accounting curriculum given by a residence or correspondence school of accountancy, including courses in elementary and advanced accounting, auditing, and cost accounting; and business law. or

   b. The equivalent of 16 semester hours of professional accounting courses given by a collegiate-grade residence institution, including courses in elementary and advanced accounting, auditing, and cost accounting; and three semester hours of business law.

KNOWLEDGE AND ABILITIES

Knowledge of: Accounting principles and practices; governmental accounting and budgeting; administrative survey principles and techniques; principles of organization, administration, and management; uniform accounting system and financial organization and procedures of the State of California; principles of public administration; office methods, equipment, and procedures; statistical methods; principles of personnel management and supervision; principles and procedures of automatic data processing systems.

Ability to: Apply administrative survey principles and techniques to the analysis and development of accounting and financial organization, procedures, and problems of governmental agencies; establish and maintain cooperative relationships with representatives of public and private agencies; prepare questionnaires and interview effectively; supervise the work of both technical and clerical assistants; analyze data and draw sound conclusions; communicate effectively; prepare comprehensive reports and compile manuals of accounting procedures; analyze situations accurately and adopt an effective course of action.

SPEC: ASSOCIATE BUDGET ANALYST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LF30
Class Code:	5284
Established:	10/8/48
Revised:	12/17/85
Title Changed:	--

ASSOCIATE BUDGET ANALYST

DEFINITION

Under general direction, in an operating agency or department, performs the more responsible and complex technical budget work by coordinating and assisting in the development, preparation, administration, maintenance, review and control of a department's budget; provides consultative budget service to department management; and does other related work.

TYPICAL TASKS

Prepares baseline budget; prepares budget revisions; reviews, analyzes, evaluates and processes budget change proposals; reconciles appropriation by source of funding; prepares and processes transfer of budget allotments; provides budget information, instruction and assistance to department staff; makes recommendations on budget matters to higher level department management; analyzes proposed legislation to determine funding impact on department programs; may review purchase estimates, printing requisitions, personnel transactions documents and contracts; prepares reports and correspondence.

MINIMUM QUALIFICATIONS

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements, provided that the combined qualifying experience totals at least 30 months. Education may not be used to reduce this 30-month limit.

Either I

One year of experience in the California state service performing the duties of a Staff Services Analyst (Range C). (Persons applying experience toward this pattern must have had a full-time assignment in California state service preparing, justifying and analyzing, or controlling and administering budgets or budgetary programs.)

Or II

Experience: Three years of progressively responsible experience with duties involving the preparation, justification, and analysis, or the control and administration of a budget or budgetary program. (Experience in California state service applied toward this pattern must include one year of experience performing duties comparable in level of responsibility of a Staff Services Analyst, Range C.) (One

year of graduate work in public or business administration, industrial relations, psychology, law, political science or a related field may be substituted for six months of the required experience.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.) (Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.)

KNOWLEDGE AND ABILITIES

Knowledge of: Principles and practices of governmental budgeting and accounting; financial structure, uniform accounting system, and financial procedures of the State of California; purposes, functions, and fiscal organization of the various State agencies; laws relating to financial administration of the State Government; principles of public and personnel administration; principles of organization and management; principles and practices of public finance, research techniques and statistical principles and procedures.

Ability to: Develop various types of budget documents; analyze and solve difficult technical budget problems; establish and maintain cooperative relationships with control agency staff and others contacted in the work; speak and write effectively; analyze situations accurately and develop an effective course of action.

SPEC: ASSOCIATE BUSINESS MANAGEMENT ANALYST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	KK40
Class Code:	4742
Established:	4/21/76
Revised:	6/12/89
Title Changed:	--

ASSOCIATE BUSINESS MANAGEMENT ANALYST

DEFINITION

Under direction, to perform independently the more difficult, responsible and complex technical and analytical work in the business and administrative services area; to act as leadperson for lower level business services staff; and to do other related work.

JOB CHARACTERISTICS

This class is differentiated from the Business Service Officer series in that positions perform analytical duties for the majority of the time, and typically also perform the more complex business services work. This class is differentiated from other Associate level analyst classes in that positions perform analytical duties relating to budgeting, management and administrative analysis requiring technical knowledge of business services functions.

TYPICAL TASKS

Analyzes and makes recommendations upon varied management problems involved in directing business services activities; analyzes and develops the budgetary program and coordinates the preparation phases of the nonpersonnel services budget; develops and improves programs for the effective procurement and utilization of office space, communications systems, forms, supplies, equipment, and other property; evaluates and makes recommendations on requests for purchases of major items of new property or repair of existing property; prepares plans and specifications for building repair or alteration; negotiates contracts and leases for services and repairs; inspects and recommends acceptance of contracted building work; controls and reviews the processing of departmental contracts including line program contracts; establishes and operates a training program for lower level analysts; makes special administrative or research studies and recommends installation of new methods and procedures; prepares analysis of proposed legislation; conducts feasibility studies and systems analysis; prepares and revises rules and manuals of procedure; performs continuing studies in records management; prepares reports; and dictates correspondence.

MINIMUM QUALIFICATIONS

Either I

Six months of experience performing the duties of a Business Service Officer II (Specialist or Supervisor).

Or II

One year of experience performing the duties of (1) a Staff Services Analyst, Range C, or (2) a Business Service Officer I (Specialist or Supervisor). (Persons applying experience toward this pattern must have had a full-time assignment in California state service performing technical business services work.)

Or III

Three years of progressively responsible analytical experience above the Trainee level in business or administrative services, budget, or management systems analysis, one year of which shall have included responsibility for conducting detailed analysis requiring the preparation and submission of findings with recommendations. (Experience in the California state service applied toward this requirement must include one year performing analytical duties of a class comparable in level of responsibility to that of Staff Services Analyst, Range C.)

(Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.)

KNOWLEDGE AND ABILITIES

Knowledge of: Analysis methods; principles and practices of governmental budgeting; principles of public and business administration; principles of organization and management; principles and practices of policy formulation, property acquisition and management, contract administration, specification writing, financial record keeping, office layout, purchasing, building management, and personnel management and supervision.

Ability to: Analyze situations and problems accurately and take effective course of action; establish and maintain effective working relations with those contacted in the course of the work; speak and write effectively; interpret and apply laws, rules, standards, and procedures; successfully negotiate agreements; estimate future needs and cost of equipment, supplies and services, and prepare budgetary data on such needs; plan and direct the work of others.

SPEC: ASSOCIATE GOVERNMENTAL PROGRAM ANALYST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	JY35
Class Code:	5393
Established:	10/1/69
Revised:	9/5/06
Title Changed:	--

ASSOCIATE GOVERNMENTAL PROGRAM ANALYST

DEFINITION

Under direction, incumbents perform the more responsible, varied, and complex technical analytical staff services assignments such as program evaluation and planning; policy analysis and formulation; systems development; budgeting, planning, management, and personnel analysis; and continually provide consultative services to management or others. This is the full journey level analyst class. Incumbents are typically subject-matter generalists who have demonstrated possession of intellectual abilities, the management tools, and the personal qualifications to succeed in a variety of general staff services settings.

TYPICAL TASKS

Incumbents are assigned to work on a broad range of governmental and managerial problems that may be interdisciplinary in nature. Incumbents may be assigned to work as field representatives in complex and controversial intergovernmental negotiations. Incumbents conduct and/or review analytical studies and surveys; formulate procedures, policies, and program alternatives; make recommendations on a broad spectrum of administrative and program-related problems; review and analyze proposed legislation and advise management on the impact or potential impact; may act as team leaders or coordinate the efforts of representatives of various governmental agencies on larger projects; represent the State or a given department as assigned; and perform other related duties.

MINIMUM QUALIFICATIONS

State experience applied toward the "General Experience" pattern must include at least one year in a class at a level of responsibility equivalent to that of the promotional class.

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other patterns to meet the total experience requirements, provided that the combined qualifying experience totals at least 30 months. Education may not be used to reduce this 30-month limit.
Education: The following education is required when general experience is used to qualify at any level: equivalent to graduation from college. (Additional qualifying experience may be substituted

for the required education on a year-for-year basis.)

and

Either I

Experience: One year of experience performing the duties of a Staff Services Analyst, Range C. or

Or II

Experience: Three years of professional analytical experience performing duties in one or a combination of the following or closely related areas: budgeting, management analysis, personnel, planning, program evaluation, or policy analysis.

Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.

(One year of graduate work in public or business administration, industrial relations, psychology, law, political science, or a related field may be substituted for six months of the required nonsupervisory experience.)

KNOWLEDGE AND ABILITIES

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; government functions and organization; and methods and techniques of effective conference leadership.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; coordinate the work of others, act as a team or conference leader; and appear before legislative and other committees.

SPECIAL PERSONAL REQUIREMENTS

Demonstrated ability to act independently, open-mindedness, flexibility, and tact.

SPEC: ASSOCIATE MANAGEMENT ANALYST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LE10
Class Code:	5246
Established:	1/14/42
Revised:	2/18/87
Title Changed:	11/17/66

ASSOCIATE MANAGEMENT ANALYST

DEFINITION

Under general direction, performs difficult and complex technical work in the area of management analysis which may include developing and improving management policies and plans; organizational structures and systems; may act as a leadperson on a team with one or two analysts who may be in an equivalent or lower classification; and to do other related work.

TYPICAL TASKS

Confers with organizational personnel to describe and to outline the scope of the problem; performs complex and difficult studies involving organization, policy, systems, procedures, and methods, including data processing; gathers and analyzes data; prepares completed reports with independent recommendations to supervisor.

MINIMUM QUALIFICATIONS

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements, provided that the combined qualifying experience totals at least 30 months. Education may not be used to reduce this 30-month limit.

Either I

One year of experience in the California state service performing the duties of a Staff Services Analyst, Range C. (Persons applying experience toward this pattern must have had an assignment in California state service conducting management surveys, including organization, procedural, policy, systems, or methods studies.)

Or II

Experience: Three years of progressively responsible experience participating in the conduct of management surveys, including organization, procedural, policy, systems, or methods studies, at least one year of which shall have included responsibility for the conduct of such studies requiring the preparation and submission of reports with recommendations. This experience must have been in a staff agency or a staff position with primary responsibility for the making of management analyses. (One year of graduate study or college teaching experience in public or business administration or industrial engineering may be substituted for six months of the

required general experience.) (Experience in the California state service applied toward this pattern must include one year of experience performing duties comparable in level of responsibility to those of a Staff Services Analyst, Range C.)

(Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.) and

Education: Equivalent to graduation from college, preferably with specialization in public or business administration or industrial engineering. (Additional qualifying experience may be substituted for four years of the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: Analysis methods, study plan preparation, statistical methods, organizational theory, principles of verbal and written expression, principles of human relations, State Government process in relation to management analysis; principles and practices of policy formalization; group leadership; principles of data processing and automation; principles and practices of personnel management. Applicants must demonstrate the acquisition of the required knowledge through activities such as the following:

A. Appropriate in-service training courses.
B. University or college courses.
C. Planned self-study.
D. Active participation in a professional group.

Ability to: Perceive fundamental course of action and develop logical yet realistic conclusions and recommend appropriate action; visualize improvements, and originate and develop new solutions which depart from traditional and existing patterns; work with others; present ideas at the right time and in the right way; willingness to assume responsibility, belief in recommendations; capacity to inspire confidence and trust.

SPEC: ASSOCIATE PERSONNEL ANALYST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	KY90
Class Code:	5142
Established:	1/13/32
Revised:	12/19/79
Title Changed:	2/1/52

ASSOCIATE PERSONNEL ANALYST

DEFINITION

Under general direction, on the staff of the Personnel Board or in an operating agency to perform the more responsible, varied and complex technical work of the State personnel management program; to advise and assist operating officials; to act as leadperson for other staff personnel; and to do other related work.

TYPICAL TASKS

Without detailed supervision or review, makes decisions and provides advice and assistance on varied and difficult personnel management problems; analyzes and classifies positions; gathers and evaluates pay data; conducts classification or pay surveys; prepares class specifications and allocation standards; prepares formal memoranda or reports on personnel matters and participates in the presentation of such matters before the Personnel Board or other official body; reviews proposed personnel actions for conformity with regulations, classification or pay standards or good personnel practice.

Prepares written examinations, writes test items, and does test research; develops techniques for the appraisal of education and experience; acts as chairperson of qualifications appraisal panels; administers or supervises the administration of tests; prepares examination publicity; plans, organizes, and coordinates recruitment programs.

Assists in the development of policies and procedures relating to the personnel management program of a State agency; assists in the recruitment and selection of employees; develops and administers staff development and training programs; prepares disciplinary proceedings; represents the agency before employees and employee organizations; develops departmental personnel rules and regulations; and supervises personnel record keeping and the operation of personnel procedures.

Interprets and explains civil service law, rules, and procedures; trains and supervises subordinate technical and clerical personnel; does research in specific areas of public personnel management; represents the agency at meetings and conferences; studies various personnel operating procedures; prepares reports, manuals, articles, and correspondence.

MINIMUM QUALIFICATIONS

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements, provided that the combined qualifying experience totals at least 30 months. Education may not be used to reduce this 30-month limit.

Either I

In the California state service, one year of experience performing the duties of a Staff Services Analyst (Range C). (Persons applying experience toward this pattern must have had a full-time assignment in California state service performing technical personnel work.)

Or II

Experience: Either

1. Three years of progressively responsible experience in technical personnel work, at least one year of which shall have been with independent responsibility for analyzing and recommending decisions on difficult personnel problems; or

2. Three years of progressively responsible technical experience administrative or budget analysis, socioeconomic research or some other field which has developed a broad and comprehensive knowledge of personnel management.

(One year of graduate work in public or business administration, personnel industrial relations, psychology, law, political science or a related field may be substituted for six months of the required experience in Pattern II. Experience in California state service applied toward this pattern must include one year of experience performing duties comparable in level of responsibility to those of a Staff Services Analyst. Range C.)

and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for a maximum of four years of the required education on a year-for-year basis.)

(In appraising experience, more weight will be given to the breadth of pertinent experience, and to evidence of the candidate's ability to accept and fulfill increasing responsibilities in personnel work than to the length of his/her experience.)

(Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.)

KNOWLEDGE AND ABILITIES

Knowledge of: Applying principles and practices of public personnel management; classification and pay principle used in analyzing and describing positions, establishing proper salary levels, and conducting classification and pay surveys; techniques of employee recruitment; employee relations and performance evaluation; test construction and source of test materials; principles, practices, and trends of public administration, and organization and

management.

Skill in: Applying principles and practices of public personnel management.

Ability to: Perform research in various personnel fields; interpret and apply laws, rules, standards, and procedures; develop and administer training programs; analyze an solve difficult technical personnel problems; appraise qualifications of applicants and interview effectively maintain the confidence and cooperation of others; analyze data and present ideas and information effectively; train an supervise subordinates; assume and demonstrate independent responsibility for decisions and actions having broad implications on various aspects of personnel management.

SPEC: BOOKBINDER II
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	RM46
Class Code:	7402
Established:	5/16/82
Revised:	10/4/01*
Title Changed:	--

BOOKBINDER II

DEFINITION

Under supervision, performs the less skilled tasks; operates equipment requiring simple setup with hand tools or manual dexterity in operation; and does other related work.

TYPICAL TASKS

Sets up and operates the following equipment: drilling machines, manually operated side and saddle stitchers, multihead stitchers, rotary slot perforators, carbon tippers, plastic wraps, and padding machines; takes sigs from bins, checks jobs, and feeds pockets; feeds books into equipment; logs and verifies job orders, table work stripping, tipping, and book repairing; checks status; pulls samples; takes readings from production records; operates bundling machines, compressors, and related equipment; fills job orders for flat sheet stock; drives forklifts; operates core splitter and other similar equipment; washes and oils small machines under direction; occasionally performs Bookbinder I duties such as sweeping and cleaning floors and moving stock or other material; and does other related work.

MINIMUM QUALIFICATIONS

Either I
One year of experience as a Bookbinder I or the equivalent.
Or II
One year of experience moving and lifting stock and printed materials in a printing facility.

KNOWLEDGE AND ABILITIES

Knowledge of: Printing plant equipment machinery operations and terminology; types of paper stock and proper methods of paper movement and handling.

Ability to: Communicate effectively; follow directions; move and/or lift up to 50 pounds; set up and operate complex nonjourney level equipment.

SPECIAL PERSONAL CHARACTERISTICS

Willingness to work under noisy conditions and on shift work; and interest in and aptitude for bindery work.

* This was adopted as a State Personnel Board Staff Item.

SPEC: BUSINESS SERVICE OFFICER
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

BUSINESS SERVICE OFFICER
Series Specification
(Established June 12, 1989)

SCOPE

This series specification describes the work performed by six professional classes used throughout State service in a wide range of business service activities. Specialist positions within this series are nonsupervisory and typically perform the most complex professional business service work assigned to the specific level.

Schem Code	Class Code	Class
KK75	4707	Business Service Assistant (Specialist)
KK70	4720	Business Service Officer I (Specialist)
KK60	4722	Business Service Officer I (Supervisor)
KK65	4970	Business Service Officer II (Specialist)
KK55	4973	Business Service Officer II (Supervisor)
KK50	4785	Business Service Officer III

DISTINGUISHING CHARACTERISTICS

Classes in this series differ from the general Staff Services Analyst and Associate Business Management Analyst classes in that incumbents perform technical business services duties for the majority of time. The incumbents of the Staff Services Analyst and Associate Business Management Analyst classes perform analytical duties for the majority of time.

ENTRY LEVELS

Entry into this series is typically from the Staff Services Analyst, Management Services Assistant, and Office Assistant (General) classifications.

FACTORS AFFECTING POSITION ALLOCATION

Variety and complexity of business service work performed including function(s) for which responsible; department size and geographic dispersement; level and type of supervision received; extent of authority to make commitments; extent of responsibility for decisions; consequence of errors; level and type of personal contacts required; and number, level and variety of staff supervised.

DEFINITION OF LEVELS*

BUSINESS SERVICE ASSISTANT (SPECIALIST)

This is the entry, developmental and first (Specialist) working level in the series. While in a trainee capacity, incumbents work under close supervision and learn to perform a variety of technical and analytical business service activities. As their skills and abilities develop, incumbents are expected to perform with increasing independence. Fully trained incumbents may, under supervision, independently perform technical business service work of a routine nature in a variety of functions; assist in the performance of more difficult and complex technical and analytical business service work; or be assigned responsibility for one or more of the least complex business service functions which are Equipment and Supplies Management, Support Services and Building Maintenance. (Analytical business service work performed at this level is described as that which would otherwise be appropriate for a Management Services Technician.)

Positions at this level are nonsupervisory but may serve as lead over lower level clerical and other staff. Positions are permanently allocated to this class when the major portion of the duties do not include independent responsibility for the more difficult and complex assignments found at the Business Service Officer I (Specialist) level.

BUSINESS SERVICE OFFICER I (SPECIALIST)

Under general supervision, incumbents independently perform technical and analytical business service work of average difficulty in a variety of functions; assist in the performance of the more difficult and complex business service work; or are assigned responsibility for one or more functions of average difficulty. Functions of average difficulty are Purchasing, Facilities Management, Capitol Outlay and Telecommunications. (Analytical work of average difficulty is described as that which would otherwise be appropriate for a Staff Services Analyst.)

Incumbents are nonsupervisory but may serve as lead over lower level staff. With an appropriate restructuring of duties, positions allocated to this class may be downgraded to Business Service Assistant (Specialist) for recruitment purposes.

BUSINESS SERVICE OFFICER I (SUPERVISOR)

This is the first supervisory level in the series. Under general supervision, incumbents typically have full supervisory responsibility for approximately 3 - 6 lower level staff in a business service office which may include general clericals, Materials and Stores Supervisors, Property Controllers, Mailing Machine Operators, and Stock Clerks.

Typically, incumbents either (1) supervise all business service functions in the smallest business service offices and may personally perform the most difficult and complex technical and analytical business service work; or (2) in larger offices, supervise one or more business service functions of average difficulty or two or more functions of least complexity as assistant to a higher level Business Service Officer and assist with the performance of more difficult and complex business service work.

BUSINESS SERVICE OFFICER II (SPECIALIST)

Under direction, incumbents either (1) perform the more difficult and complex technical and analytical work of a business service nature in a wide variety of functions; or (2) in a medium to large business service office, are assigned responsibility for one or more of the most difficult and complex technical/analytical functions which are Facilities Planning and Acquisition and Contracts; or (3) in larger offices, may assist with the performance of most complex functions. The level of analytical work performed is described as a mix of that which would be appropriate for a Staff Services Analyst/ Associate level analysts.

Positions are nonsupervisory but may serve as lead over lower level staff.

BUSINESS SERVICE OFFICER II (SUPERVISOR)

Under direction, incumbents either (1) supervise all of the business service functions of a small- to medium-sized business service office and may personally perform the more difficult and complex technical and analytical work; or (2) in larger offices, supervise one or more business service functions of average difficulty, or may assist with the performance of other difficult and complex work.

Incumbents typically supervise seven to twelve staff of which one or more are Business Service Assistant (Specialist) or Business Service Officer I (either Specialist or Supervisor). Other classes supervised may include general clericals, Materials and Stores Supervisors, Property Controllers, Mailing Machine Operators, and Stock Clerks.

BUSINESS SERVICE OFFICER III

Under direction, incumbents typically supervise (1) all business service functions in a medium to large business service office; or (2) in larger offices, may supervise two or more functions as assistant to a higher level manager. In addition, incumbents may personally perform technical or analytical business service work of highest complexity.

Typically incumbents are second or third level supervisor over 13 - 20 staff with 3 - 5 subordinate professional staff. Other classes supervised may include those listed above for the II level supervisor.

MINIMUM QUALIFICATIONS

BUSINESS SERVICE ASSISTANT (SPECIALIST)

Either I

One year of experience in the California state service performing duties comparable to those of an Office Assistant (General), Range B, or Management Services Assistant.

Or II

One year of experience in a technical capacity with responsibility for one or a combination of business service activities such as accountability and maintenance of office and industrial equipment, major building maintenance, managing of major commercial properties, or fiscal management and accountability of office and industrial property. [Experience in California state service applied toward this requirement must include one year performing the duties of a class comparable to Office Assistant (General), Range B.]

BUSINESS SERVICE OFFICER I (SPECIALIST)
BUSINESS SERVICE OFFICER I (SUPERVISOR)

Either I

One year of experience in the California state service performing duties comparable to those of a Business Service Assistant (Specialist), Range C, or of a Staff Services Analyst, Range B, in a business service assignment. (Applicants who have completed six months of service performing the duties listed above will be admitted to the examination but must satisfactorily complete one year of experience performing these duties before they can be considered eligible for appointment.)

Or II

Experience: One year of technical experience beyond the Trainee level in one or a combination of the following:

1. Equipment and supplies management including the preparation of purchase documents. or

2. Building management including lease negotiation and problem resolution. or

3. Telecommunications including landwire and radio/microwave.

[Experience in California state service applied toward this requirement must include one year performing the duties of a class at a level of responsibility equivalent to that of a Business Service Assistant (Specialist), Range C.] and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

BUSINESS SERVICE OFFICER II (SPECIALIST)
BUSINESS SERVICE OFFICER II (SUPERVISOR)

Either I

One year of experience in the California state service performing the duties of a Business Service Officer I (Specialist) or (Supervisor); Procurement and Services Officer I; Hospital General Services Administrator I; or of a Staff Services Analyst, Range C; in a business service assignment.

Or II

Experience: Two years of technical experience beyond the Trainee level in one or a combination of the following:

1. Negotiation of commercial, industrial, or office leases for buildings. or

2. Management of industrial or office buildings with

responsibility for maintenance, repairs, equipment and service. or

3. Preparation of working plans and technical specifications, and solicitation and awarding of bids for alterations to, construction or purchase of commercial, industrial, or office buildings or major equipment. or

4. Business service contract management and oversight.

[Experience in California state service applied toward this requirement must include one year performing the duties of a class at a level of responsibility equivalent to that of a Business Service Officer I (Specialist or Supervisor).] and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

BUSINESS SERVICE OFFICER III

Either I

One year of experience in the California state service performing the duties of a Business Service Officer II (Specialist) or (Supervisor), or Procurement and Services Officer II.

Or II

Two years of experience in the California state service performing the duties of a Business Services Officer I (Specialist) or (Supervisor), Procurement and Services Officer I, or Hospital General Services Administrator I.

Or III

Experience: Three years of progressively responsible and varied experience in the business service field in a public or private organization, at least one year of which must have been in a supervisory capacity. [Experience in California state service applied toward this requirement must include one year performing the duties of a class at a level of responsibility equivalent to that of a Business Service Officer II (Specialist) or (Supervisor) or two years performing the duties of a class at a level of responsibility equivalent to that of a Business Service Officer I (Specialist) or (Supervisor).] and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

BUSINESS SERVICE ASSISTANT (SPECIALIST)

Knowledge of: English grammar and punctuation; principles and practices of public administration; financial record keeping; and office and automotive equipment and supplies.

Ability to: Communicate effectively; learn rapidly; follow directions; analyze data accurately; reason logically; maintain the confidence and cooperation of those contacted during the course of work; and utilize good work habits.

BUSINESS SERVICE OFFICER I (SPECIALIST)
BUSINESS SERVICE OFFICER II (SPECIALIST)

Knowledge of: All of the above and bases for property values and the legal forms, procedures and requirements necessary in property transactions; building management including office layout, lighting, heating and ventilation.

Ability to: All of the above and write specifications and determine whether incoming materials, supplies and equipment meet the standards set up in these specifications; utilize office and automotive equipment and supplies effectively and economically; prepare rough sketches of proposed alterations and repairs to premises and estimate costs; inspect miscellaneous properties and equipment and correctly report their condition and recommend replacements; plan and direct the work of others; successfully negotiate agreements for office space, equipment, supplies and services; prepare budgetary data on such needs; and analyze situations and problems accurately and take an effective course of action.

BUSINESS SERVICE OFFICER I (SUPERVISOR)
BUSINESS SERVICE OFFICER II (SUPERVISOR)
BUSINESS SERVICE OFFICER III

Knowledge of: All of the above and personnel management and supervision; the department's Affirmative Action Program objectives; a supervisor's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above and estimate future needs and cost of equipment, supplies and services and prepare budgetary data on such needs; and effectively contribute to the department's affirmative action objectives.

ALTERNATE RANGE CRITERIA 274

BUSINESS SERVICE ASSISTANT (SPECIALIST)

Range A. This range shall apply to incumbents who do not meet the criteria for payment in Range B or Range C.

Range B. This range shall apply to persons who have satisfactorily completed either: (1) six months of experience performing the duties of a Business Service Assistant (Specialist), Range A, and six semester or nine quarter units of college courses in English, public or business administration, accounting, statistics, or a subject area closely related to the work of a Business Service Assistant (Specialist) as determined by the appointing power; or (2) one year of experience performing duties at a level of responsibility equivalent to Office Technician; or (3) Equivalent to graduation from college, preferably with major work in a field related to business or public administration.

Range C. This range shall apply to persons who have satisfactorily completed the equivalent of one year of experience performing the duties equivalent to Business Service Assistant (Specialist),

Range B.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Business Service Assistant (Specialist)	6/12/89	--	--
Business Service Officer I (Specialist)	3/28/46	6/12/89	11/7/84
Business Service Officer I (Supervisor)	3/28/46	6/12/89	11/7/84
Business Service Officer II (Specialist)	10/17/52	6/12/89	11/7/84
Business Service Officer II (Supervisor)	10/17/52	6/12/89	11/7/84
Business Service Officer III	3/28/46	6/12/89	10/17/52

*Additional information regarding functions performed, complexity factors, and scope of responsibility, is contained in a separate document titled "Allocation Guidelines".

SPEC: BUSINESS TAXES ADMINISTRATOR
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

BUSINESS TAXES ADMINISTRATOR
Series Specification
(Established May 14, 1980)

SCOPE

This series specification describes the Business Taxes Administrator series used at the State Board of Equalization. These classes are used for supervisory and managerial positions with responsibility for directing the operations of a Department of Business Taxes field facility or a major headquarters tax program involved in the administration of the Sales and Use Tax law, the Motor Vehicle and Use Fuel laws, and the various State excise tax laws.

Schem Code	Class Code	Class
JH64	4335	Business Taxes Administrator I, Board of Equalization
JH62	4331	Business Taxes Administrator II, Board of Equalization
JH60	4320	Business Taxes Administrator III, Board of Equalization

DEFINITION OF LEVELS

BUSINESS TAXES ADMINISTRATOR I, BOARD OF EQUALIZATION

Under general direction from the District Administrator, employees in this class are responsible for managing the total (audit and compliance) tax program in a branch office or a group of branch offices comprised of four or more staff including three or more professional staff.

BUSINESS TAXES ADMINISTRATOR II, BOARD OF EQUALIZATION

Under general direction from the District Administrator, employees in this class are responsible (1) for managing, through multiple subordinate supervisors, the total (audit and compliance) tax program in a branch office (comprised of 25 or more total staff including 15 or more professional staff) which may include a group of branch offices; or (2) in a headquarters setting, function as one of the following unit supervisors: Special Taxes, Environment Fees, and Internal Audit.

BUSINESS TAXES ADMINISTRATOR III, BOARD OF EQUALIZATION

Employees in this class either: (1) under administrative direction from the Chief of Field Operations, manage, through multiple subordinate the total (audit and compliance) tax program in a

District Office comprised of 70 or more total staff including 40 or more professional staff; or (2) in a headquarters setting, function as one of the following: Assistant Deputy Director, Business Taxes, Excise Tax Administrator, Assistant Chief of Field Operations, and Headquarters Operations Administrator.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience applicable to any one of the following patterns may be combined, on a proportional basis, to meet the total experience requirement.

BUSINESS TAXES ADMINISTRATOR I, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing the duties of a Business Taxes Compliance Supervisor I; Associate Tax Auditor, Board of Equalization; Staff Tax Auditor, Board of Equalization or a Business Taxes Compliance Specialist.

Or II

Experience: Three years of increasingly responsible professional auditing experience in governmental, commercial, or public auditing. (Experience in California state service applied toward this requirement must include at least one year of qualifying experience at the level of responsibility at least equivalent to Business Taxes Compliance Specialist; or Associate Tax Auditor, Board of Equalization.) (Experience applied toward this pattern must include at least one year of experience in the supervision of a professional accounting or auditing staff.) and

Education: Either

1. Equivalent to graduation from college with specialization in accounting, including satisfactory completion of courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

2. Completion of either:

   a. A prescribed professional accounting curriculum given by a residence or correspondence school of accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

   b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced accounting, auditing, and cost accounting, and three semester units of business law.

BUSINESS TAXES ADMINISTRATOR II, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing the duties of a Business Taxes Administrator I, Board of Equalization; Business Taxes Compliance Supervisor II; Business Taxes Compliance Supervisor III; Supervising Tax Auditor I, Board of Equalization; or Supervising Tax Auditor II, Board of Equalization.

Or II

Two years of experience in California state service performing the duties of a Business Taxes Compliance Supervisor I or Staff Tax Auditor, Board of Equalization.

Or III

Experience: Four years of increasingly responsible experience in governmental, commercial, or public accounting or auditing work, performing any one of a combination of the following types of work: (1) construction and installation of varied accounting systems; or (2) responsibility for the preparation of comprehensive financial statements and tax returns; or (3) directing or assisting in the direction of the accounting and budgetary work of a business concern or governmental agency; or (4) analytical and critical examination of financial records and books of accounts involved in conducting management audits of business concerns or governmental agencies. (Experience in California state service applied toward this requirement must include at least one year of qualifying experience at a level of responsibility at least equivalent to a Business Taxes Compliance Supervisor II or Supervising Tax Auditor I, Board of Equalization.) (Experience applied toward this pattern must include at least two years of experience in the supervision of a professional accounting or auditing staff.) and

Education: Either

1. Equivalent to graduation from college with specialization in accounting, including satisfactory completion of courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

2. Completion of either:

   a. A prescribed professional accounting curriculum given by a residence or correspondence school of accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

   b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced accounting, auditing, and cost accounting, and three semester units of business law.

BUSINESS TAXES ADMINISTRATOR III, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing the duties of a Business Taxes Administrator II, Board of Equalization, Business Tax Compliance Supervisor III; Supervising Tax Auditor II, Board of Equalization; or a Supervising Tax Auditor III, Board of Equalization.

Or II

Two years of experience in California state service performing the

duties of a Business Taxes Compliance Supervisor II, Supervising Tax Auditor I, Board of Equalization, or a Business Taxes Administrator I, Board of Equalization.

Or III

Experience: Five years of increasingly responsible experience in governmental, commercial, or public accounting work involving any one or a combination of the following types of work: (1) construction and installation of varied accounting systems; or (2) responsibility for the preparation of comprehensive financial statements and tax returns; or (3) directing or assisting in the direction of the accounting and budgetary work of a business concern or governmental agency; or (4) analytical and critical examination of financial records and books of accounts involved in conducting audits of business concerns or government agencies. (Experience in California state service applied toward this requirement must include at least one year of qualifying experience at a level of responsibility at least equivalent to a Business Taxes Compliance Supervisor III or Supervising Tax Auditor II, Board of Equalization.) (Experience applied toward this pattern must include at least three years of experience in the supervision of a professional accounting or auditing staff.) and

Education: Either

1. Equivalent to graduation from college with specialization in accounting, including satisfactory completion of courses in elementary and advanced accounting, auditing, cost accounting, and commercial law; or

2. Completion of either:

   a. A prescribed professional accounting curriculum given by a residence or correspondence school of accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

   b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced accounting, auditing, and cost accounting, and three semester units of business law.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: General accounting and auditing principles and procedures/and business law; specialized practices and procedures used in tax auditing; general collection principles, procedures, and techniques; specialized collection and compliance procedures and practices used in tax administration; provisions of the tax laws administered by the State Board of Equalization, related legal opinions and court decisions; departmental policies, rules and regulations; organization of the Board of Equalization; principles, practices and trends of public and business administration; principles and techniques of personnel management, supervision and employee-employer relations; departmental administrative goals and policies; and the State Board of Equalization's Affirmative Action

Program objectives; and a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Apply the required knowledge; plan, organize, and direct the work of a staff engaged in tax auditing and tax compliance; develop the skills and abilities of subordinate staff; motivate subordinate staff to develop group and organizational goals; resolve complex supervisorial and managerial problems; work cooperatively with persons subject to tax or regulation; analyze data and draw sound conclusions; analyze situations accurately and take effective action; prepare clear, complete and concise reports; communicate effectively; and effectively contribute to the State Board of Equalization's affirmative action objectives.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Business Taxes Administrator I, Board of Equalization	2/16/62	1/9/90	1/9/90
Business Taxes Administrator II, Board of Equalization	8/6/59	1/9/90	1/9/90
Business Taxes Administrator III, Board of Equalization	5/14/80	1/9/90	1/9/90

CALIFORNIA STATE PERSONNEL BOARD
SPECIFICATION

BUSINESS TAXES REPRESENTATIVE
BUSINESS TAXES COMPLIANCE SUPERVISOR
Series Specification
(Established February 7, 1979)

SCOPE

This series specification describes the Business Taxes Representative and Business Taxes Compliance Supervisor classes used for positions with professional, supervisorial, or managerial responsibilities in the State Board of Equalization business taxes compliance program.

Schem Code	Class Code	Class
JH88	8690	Business Taxes Representative
JH86	8694	Business Taxes Compliance Specialist
JH82	8698	Business Taxes Compliance Supervisor II
JH80	4426	Business Taxes Compliance Supervisor III
JJ65	8615	Principal Business Taxes Compliance Supervisor

DEFINITION OF SERIES

Business Taxes Representatives provide assistance to taxpayers to ensure compliance with tax laws, collect delinquent taxes, and perform a variety of compliance and collection functions. Business Taxes Compliance Specialists perform the most complex compliance and collection functions. The Business Taxes Compliance Supervisors II and III are used in a supervisory capacity to direct one or more compliance programs. The Principal Business Taxes Compliance Supervisor manages the compliance staff support activities in Headquarters and develops and administers the State Board of Equalization's compliance policies, procedures, and programs.

ENTRY LEVEL

Entry into this series is at the Business Taxes Representative classification.

DEFINITION OF LEVELS

BUSINESS TAXES REPRESENTATIVE

This is the recruiting/training and journey level in this series. Under close supervision, incumbents learn all phases of tax compliance, licensing, and law, rule, and regulation administration; and perform all aspects of compliance and collection work, including collection, registration, revocation, and criminal investigation.

BUSINESS TAXES COMPLIANCE SPECIALIST

This is an advanced journeyperson level. Under general supervision, independently performs the more complex activities on a full-time basis. These positions are found in offices where the workload permits specialization and concentration in a case load of the most complex activities.

BUSINESS TAXES COMPLIANCE SUPERVISOR II

This is a full supervisory level. Under direction, either (1) plans, organizes, and directs the compliance programs and activities of a medium organizational entity, or (2) in the large organizational entity, supervises a major compliance program or a group of compliance programs, or (3) performs equivalent level supervisory or staff specialist work in headquarters.

BUSINESS TAXES COMPLIANCE SUPERVISOR III

Under general direction, either (1) plans, organizes, and directs the compliance programs and activities of a large organizational entity, or (2) in the headquarters, to be responsible for a statewide program, procedure development, or planning of compliance activities, or (3) performs equivalent level supervisory or staff specialist work in headquarters.

PRINCIPAL BUSINESS TAXES COMPLIANCE SUPERVISOR

This is the highest class in this series. Under administrative direction, is responsible for the headquarters staff support activities for the total compliance program.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience applicable to one of the following patterns may be combined, on a proportional basis, with experience applicable to another pattern to meet the total experience requirement.

BUSINESS TAXES REPRESENTATIVE

Education: Completion of at least four college-level courses, given by an approved collegiate-grade residence institution, which includes the equivalent to completion of: (1) two professional level courses in elementary and/or intermediate accounting; (2) one course in either business or commercial law; and (3) one course in either economics, business mathematics, or English.

and

Either I

Experience: Six months of experience in the California state service in the class of either Management Services Technician, Range B, or Program Technician III performing tax compliance duties at the Employment Development Department, the Franchise Tax Board, or the State Board of Equalization, or performing Medi-Cal overpayment recovery duties at the Department of Health Care Services.

Or II

Experience: One year of experience in the California state service in the class of Program Technician II performing tax compliance duties at the Employment Development Department, the Franchise Tax Board, or the State Board of Equalization, or performing Medi-Cal overpayment recovery duties at the Department of Health Care Services.

Or III

Experience: One year of experience in one or a combination of the following:

a. As the owner or manager of a business performing management activities in the marketing, distribution, or sale of merchandise, which requires broad public or customer contact; or

b. As a credit manager, loan officer, or field collector performing duties with responsibilities involving the approval of loans or credit or the collection of delinquent accounts; or

c. Performing tax compliance duties in another governmental entity.

(Experience in the California state service applied toward this pattern must include six months at a level equivalent to the Management Services Technician, Range B, or Program Technician III, or one year at a level equivalent to the Program Technician II.) and

Education: Equivalent to completion of two years (60 semester or 90 quarter units) of college. (Additional experience may be substituted for the required general education on a year-for-year basis. No substitution is permitted for the specific course work required.) (Applicants who will complete the required education during the current quarter or semester will be admitted to the examination; however, evidence of successful completion of the curriculum and prescribed courses must be produced before being considered eligible for appointment.)

Or IV

Education: Equivalent to graduation from college (registration as a senior student in a recognized institution will admit applicants to the examination; however, evidence of successful completion of the curriculum and the prescribed courses must be produced before being considered eligible for appointment.)

BUSINESS TAXES COMPLIANCE SPECIALIST

Either I

One year of experience in the California state service performing the duties of a Business Taxes Representative, Range C.

Or II

Four years of field experience in tax law compliance and tax collection work, at least one year of which shall have involved performance of the most difficult assignments. (Experience in the California state service applied toward this pattern must include one year at a level equivalent to a Business Taxes Representative, Range C.)

BUSINESS TAXES COMPLIANCE SUPERVISOR II

Either I

One year of experience in the California state service performing duties at a level equivalent to a Business Taxes Compliance Supervisor I.

Or II

Two years of experience in the California state service performing the duties of a Business Taxes Representative, Range C.

Or III

Five years of experience in tax law compliance and tax collection work, at least two years of which shall have been in a responsible supervisory position. (Experience in the California state service applied toward this pattern must include one year at a level equivalent to a Business Taxes Compliance Supervisor I or two years at a level equivalent to a Business Taxes Representative, Range C.)

BUSINESS TAXES COMPLIANCE SUPERVISOR III

Either I

One year of experience in the California state service performing duties at a level equivalent to a Business Taxes Compliance Supervisor II.

Or II

Two years of experience in the California state service performing duties at a level equivalent to a Business Taxes Compliance Supervisor I or Business Taxes Compliance Specialist.

Or III

Five years of experience in tax law compliance and tax collection work, at least three years of which shall have been in a responsible supervisory position. (Experience in the California state service applied toward this pattern must include one year at a level equivalent to a Business Taxes Compliance Supervisor II or two years at a level equivalent to a Business Taxes Compliance Supervisor I.)

PRINCIPAL BUSINESS TAXES COMPLIANCE SUPERVISOR

One year of experience in the California state service performing administrative or supervisory tax compliance duties at a level equivalent to a Business Taxes Compliance Supervisor III.

KNOWLEDGE AND ABILITIES

BUSINESS TAXES REPRESENTATIVE

Knowledge of: Methods and problems of organization, administration, and management; and commercial law, business practices, and financial record keeping.

Ability to: Apply the required knowledge; communicate effectively; interpret and apply provisions of the tax laws, rules, and regulations administered by the State Board of Equalization; analyze situations accurately and take effective action; and use tact and good judgment in dealing with the public under stressful conditions.

BUSINESS TAXES COMPLIANCE SPECIALIST

Knowledge of: All of the above; and rules of evidence, preparation of evidence, and court procedures; interviewing techniques; methods used by violators in evading tax liability; investigation techniques and sources of information used in locating persons; methods used and remedies available for the collection of taxes; and functions of Federal, State, and local tax, regulatory, and law enforcement agencies.

Ability to: Apply the required knowledge; independently conduct complex investigations and detect or verify suspected violations; and establish and maintain cooperative relationships with law enforcement agencies and others contacted in the work.

ALL LEVELS ABOVE BUSINESS TAXES COMPLIANCE SPECIALIST

Knowledge of: All of the above; and principles, practices, and trends of public and business administration; principles and techniques of personnel management, supervision, and employer-employee relations; the State Board of Equalization's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment; and departmental administrative goals.

Ability to: Apply the required knowledge; plan, organize, and direct the work of others; develop the skills and abilities of subordinate staff; resolve complex supervisorial and managerial problems; and effectively and promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

PRINCIPAL BUSINESS TAXES COMPLIANCE SUPERVISOR

Knowledge of: All of the above and all specialized compliance procedures and practices used by the State Board of Equalization.

Ability to: Apply the required knowledge and develop policy and procedures for the statewide business taxes compliance program.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Willingness to work long and irregular hours and in various locations throughout the State, and have keenness of observation, persistency, imagination, and tact.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Business Taxes Representative	01/11/1989	08/08/2008	--
Business Taxes Compliance Specialist	02/07/1979	08/08/2008	--
Business Taxes Compliance Supervisor II	02/07/1979	08/08/2008	--
Business Taxes Compliance Supervisor III	02/07/1979	08/08/2008	--
Principal Business Taxes Compliance Supervisor	12/05/1958	08/08/2008	02/07/1979

SPEC: BUSINESS TAXES SPECIALIST, BOARD OF EQUALIZATION, SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

BUSINESS TAXES SPECIALIST, BOARD OF EQUALIZATION
Series Specification
(Established June 15, 1998)

SCOPE

This series specification describes three levels of staff business taxes specialists used at the Board of Equalization in various capacities who provide technical advice or guidance to audit and compliance staff; perform in a lead capacity as trainer or as project leader; serve as highly skilled technical experts on the most complex projects regarding statewide compliance and audit practices and policies; conduct administrative conferences and render decisions and recommendations on taxpayers' protests of audit procedures and findings; resolve sensitive taxpayer contacts involving management, elected officials, and tax professionals; perform analyses of policy issues and legislation; serve as liaison or the Board's representative at appeal hearings and legislative hearings; advocate the position of the tax program at tax appeal hearings before the elected Board of Equalization members; conduct internal audits and employee investigations; or serve as a specialist and consultant with broad responsibilities for implementation, coordination, and review of the audit and compliance programs.

Incumbents conduct the most difficult and complex audits, typically consisting of the largest industrial corporations in the United States, or review all field audit reports in a District Office, or in a Headquarters setting perform specialized, complex auditing work.

Schem Code	Class Code	Class
JH74	4380	Business Taxes Specialist I, Board of Equalization
JH72	4379	Business Taxes Specialist II, Board of Equalization
JH70	4378	Business Taxes Specialist III, Board of Equalization

ENTRY INTO SERIES

Entry into this series would typically be from the professional audit and compliance series used by the Board of Equalization.

FACTORS AFFECTING POSITION ALLOCATION

Factors affecting the position allocation include the level of responsibility, independence of action, and decision-making authority for planning, coordinating, monitoring, evaluating, and providing technical support to audit and compliance programs on a districtwide or statewide basis. Positions are allocated based on the variety and complexity of the work performed; direction received; role in the formulation of policy; adequacy of legal precedents or audit precedents; complexity of the ownership; potential for litigation and negotiations; breadth of knowledge required for multiple programs; extent of interagency or legislative cooperation and involvement; impact of position on statewide programs, policies, and operations;

and nature of contacts.

Additional positions may be allocated to this series where leadperson responsibilities are included. Positions with leadperson responsibilities will be allocated based on the level and/or number of staff led, level and complexity of work performed and/or reviewed, and percentage of time spent in the leadperson capacity.

DEFINITION OF LEVELS

ALL LEVELS:

Business Taxes Specialists, Board of Equalization, serve as a nonsupervisory staff specialist or as a highly skilled, technical specialist in a difficult and sensitive program, development, evaluation, or policy position.

BUSINESS TAXES SPECIALIST I, BOARD OF EQUALIZATION

Incumbents may be responsible for coordinating and reviewing the work of professional staff; researching and developing memoranda on tax issues, laws, and legislation; and acting as lead on large complex projects and assuming responsibility for completion or work independently to formulate and develop solutions to any problems. Incumbents perform similar lead duties as a trainer or on a task force. These roles must be accompanied by duties that reflect a highly skilled, independent consultant with the ability to act authoritatively in a functional specialty. Incumbents conduct the most difficult and complex audits, typically consisting of the largest industrial corporations in the United States, or review all field audit reports in a District Office, or in a Headquarters setting perform specialized, complex auditing work.

BUSINESS TAXES SPECIALIST II, BOARD OF EQUALIZATION

A Business Taxes Specialist II, Board of Equalization, may be responsible for coordinating, monitoring, and evaluating compliance and audit programs, on a statewide or areawide basis, as well as investigations and complaints of employee misconduct. Incumbents may also independently coordinate and lead specific complex Board of Equalization projects, which may have significant impact or influence on Board of Equalization's policies and procedures. The Business Taxes Specialist II, Board of Equalization, may communicate and negotiate with taxpayers on sensitive issues and problems. Incumbents may serve as liaison with the Legislature, conduct conferences, represent and advocate the position of the tax program at tax appeal hearings before the elected Board of Equalization members, and
negotiate and make determinations independently and objectively on tax or fee issues. Incumbents may also perform activities that support field audit and compliance systems, policies, and procedures.

BUSINESS TAXES SPECIALIST III, BOARD OF EQUALIZATION

A Business Taxes Specialist III, Board of Equalization, serves as the highest level technical resource to departmental management and legal staff on matters concerning audit, compliance, tax, or fee policy issues. Incumbents will be involved in policy and procedure development and evaluation for handling unprecedented tax or fee issues, specific industries, politically sensitive administrative investigations, and development of legislation. Incumbents may serve

as principal technical advisors to executive, managerial, or board member staff and as recognized authorities who independently review and negotiate resolution to the most sensitive taxpayer issues and complaints requiring a high level of technical knowledge in all tax and fee programs administered by the Board.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Education Requirements: Applicants competing under non-State experience patterns for the Business Taxes Specialist, Board of Equalization, classes must have:

A. Equivalent to graduation from college with a specialization in accounting. or

B. Completion of either:

1. A prescribed professional accounting curriculum given by a residence or correspondence school of accountancy, including courses in elementary and advanced accounting, auditing, cost accounting, and business law. or

2. The equivalent of 16 semester hours of professional accounting courses given by a collegiate-grade residence institution, including courses in elementary and advanced accounting, auditing, and cost accounting; and three semester hours of business law.

BUSINESS TAXES SPECIALIST I, BOARD OF EQUALIZATION

Either I

One year of experience in the California state service performing duties that provide a thorough knowledge of audit or compliance programs administered by the Board of Equalization in a class with a level of responsibility equivalent to that of an Associate Tax Auditor, Board of Equalization; a Business Taxes Compliance Specialist; or a Business Taxes Compliance Supervisor I.

Or II

Four years of increasingly responsible professional tax accounting, auditing, compliance, collection, or administrative tax program experience. (Experience in the California state service applied toward this requirement must include at least one year performing the duties equivalent to either an Associate Tax Auditor, Board of Equalization; Business Taxes Compliance Specialist; or Business Taxes Compliance Supervisor I.)

BUSINESS TAXES SPECIALIST II, BOARD OF EQUALIZATION

Either I

One year of experience in the California state service performing the duties of a Business Taxes Specialist I, Board of Equalization.

Or II

Two years of experience in the California state service performing the duties of an Associate Tax Auditor, Board of Equalization; Business Taxes Compliance Specialist; or Business Taxes Compliance Supervisor I.

Or III

Five years of increasingly responsible professional tax accounting, auditing, compliance, collection, or administrative tax program experience. (Experience in the California state service applied toward this requirement must include at least one year performing the duties of a

Business Taxes Specialist I, Board of Equalization; Supervising Tax Auditor I, Board of Equalization; Business Taxes Compliance Supervisor II; or Business Taxes Administrator I, Board of Equalization; or two years of performing the duties of an Associate Tax Auditor, Board of Equalization; Business Taxes Compliance Specialist; or Business Taxes Compliance Supervisor I.

BUSINESS TAXES SPECIALIST III, BOARD OF EQUALIZATION

Either I

One year of experience in the California state service performing the duties of either a Business Taxes Specialist II, Board of Equalization; Supervising Tax Auditor II, Board of Equalization; or Business Taxes Compliance Supervisor III.

Or II

Two years of experience in the California state service performing the duties of either a Business Taxes Specialist I, Board of Equalization; Supervising Tax Auditor I, Board of Equalization; Business Taxes Compliance Supervisor II; or Business Taxes Administrator I, Board of Equalization.

Or III

Six years of increasingly responsible professional tax accounting, auditing, compliance, collection, or administrative tax program experience. (Experience in the California state service applied toward this requirement must include at least one year performing the duties of either a Business Taxes Specialist II, Board of Equalization; Supervising Tax Auditor II, Board of Equalization; or Business Taxes Compliance Supervisor III; or two years of experience performing the duties of either a Business Taxes Specialist I, Board of Equalization; Supervising Tax Auditor I, Board of Equalization; Business Taxes Compliance Supervisor II; or Business Taxes Administrator I, Board of Equalization.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: General accounting and business law; methods and problems of organization, administration, and management; provisions of the tax laws and regulations administered by the State Board of Equalization, including related legal opinions, court decisions, or precedents; departmental policies, rules, the operations of Federal, State, and local tax, regulatory, and law enforcement agencies; methods used by violators in evading tax liability; investigative techniques and sources of information used in locating persons; methods used and remedies available for the collection of taxes; the court procedures and rules of evidence; the organization of the State Board of Equalization, particularly the auditing and compliance programs; the legislative process; general principles of automation as related to audit and compliance.

Ability to: Apply the required knowledge; interpret and apply tax and fee laws, regulations, and compliance and audit procedures objectively and without bias; meet with and obtain the cooperation of persons subject to tax regulation; coordinate projects and training; make effective presentations; analyze data and situations accurately, draw sound conclusions, and take effective action; prepare clear and concise reports; communicate effectively.

BUSINESS TAXES SPECIALIST II, BOARD OF EQUALIZATION

Knowledge of: All of the above, and interviewing techniques; the

legislative process.

Ability to: Apply the required knowledge; serve in a lead capacity; organize, coordinate, and oversee large, collaborative projects involving complex and sensitive tax, fee, compliance, or audit issues; independently negotiate with tax payers to resolve complaints; conduct confidential internal audits and employee investigations; develop and analyze legislation; represent the Board of Equalization at appeals conferences and legislative hearings.

BUSINESS TAXES SPECIALIST III, BOARD OF EQUALIZATION

Knowledge of: All of the above, and principles, practices, and trends of public and business administration; specialized compliance and auditing procedures and practices used by the State Board of Equalization; unique or precedent setting issues and policies; all tax and fee laws and programs administered by the Board of Equalization; departmental administrative goals and policies.

Ability to: Apply the required knowledge; establish and implement audit and/or compliance procedures that recognize the variance of business practices; participate in the development of departmental policy and legislation; present the State Board of Equalization's position with regard to unique or precedent-setting audit and/or compliance issues and policies; advocate the position of the tax program at tax appeal hearings before the elected Board of Equalization members; create and maintain goodwill in negotiating sensitive contacts with taxpayers and elected officials; act authoritatively with management, taxpayers, the Legislature, and other professional entities and their staff.

SPECIAL PERSONAL CHARACTERISTICS

Employees must be willing to travel and work away from the office.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Business Taxes Specialist I, Board of Equalization	6/15/98	--	--
Business Taxes Specialist II, Board of Equalization	6/15/98	--	--
Business Taxes Specialist III, Board of Equalization	6/15/98	--	--

CAREER EXECUTIVE ASSIGNMENT (CEA)

There is no class specification for CEA, class code 7500. The following Civil Service Status Requirement and Minimum Qualifications are based on the August 8, 1979 Board Calendar, related Government Code and California Code of Regulations, and the State Personnel Board Selection Manual, Section 5650:

Civil Service Status Requirement and Minimum Qualifications

Applicants must have permanent California state civil service status (except that Legislative employees who meet the criteria in Government Code Section 18990 or Executive Branch exempt employees who meet the criteria in Government Code Section 18992 may also compete in CEA examinations), and satisfy the generic minimum qualifications, i.e., ability to perform high administrative and policy-influencing functions effectively. Such overall ability requires possession of most of the following more specific knowledge and abilities:

(a) Knowledge of the organization and functions of California State Government including the organization and practices of the Legislature and the Executive Branch; principles, practices, and trends of public administration, organization, and management; techniques of organizing and motivating groups; program development and evaluation; methods of administrative problem solving; principles and practices of policy formulation and development; personnel management techniques; the department's or agency's Affirmative Action Program objectives; and a manager's role in the Affirmative Action Program.

(b) Ability to plan, organize, and direct the work of multidisciplinary professional and administrative staff; analyze administrative policies, organization, procedures, and practices; integrate the activities of a diverse program to attain common goals; gain the confidence and support of top level administrators and advise them on a wide range of administrative matters; develop cooperative working relationships with representatives of all levels of government, the public, and the Legislative and Executive Branches; analyze complex problems and recommend effective courses of action; prepare and review reports; and effectively contribute to the department's or agency's affirmative action objectives.

These knowledge and abilities are expected to be obtained from the following kinds of experience (experience may have been paid or volunteer; in State service, other government settings, or in a private organization):

CEA Level 1. Supervisory/administrative experience in a line or staff activity, including the execution and/or evaluation of program policies.

CEA Levels 2 and 3. Broad administrative or program manager experience with substantial participation in the formulation, operation, and/or evaluation of program policies.

CEA Levels 4 and 5. Extensive managerial and program administrative experience which has included substantial responsibility for a combination of management functions such as

program planning; policy formulation; organization coordination and control; and fiscal and personnel management.

Where high technical professional qualifications are of primary importance in performing the duties of a given CEA position, then the above required experience may have been in a staff capacity exercising professional skills to influence and contribute to program, policy, and methods of providing those professional services. Primary examples are medical doctors and attorneys.

Description of Desirable Qualifications (if any):

When examining for either a group of positions or a single position, "Desirable Qualifications" (DQs) should be developed and listed on the bulletin. The purpose of the DQs is to provide the department with a means of evaluating competitors, as well as providing competitors with a means of determining their own relative competitiveness. They also serve as a quide for competitors to provide appropriate information on applications.

CEA LEVELS CRITERIA

The pay level of a CEA is determined by DPA based on the following criteria.

CRITERIA CODE	DEPARTMENT SIZE	CEA CRITERIA
CEA 1		
1A	SMALLEST/SMALL DEPARTMENT	DIVISION CHIEF with a program of AVERAGE responsibility and complexity.
1B	MODERATE, LARGE DEPARTMENT	PROGRAM MANAGER with FULL management and supervisory responsibility for a SPECIALIZED function.
1C	MODERATE, LARGE DEPARTMENT	High level STAFF SPECIALIST with AVERAGE coordinating or program planning responsibility.
CEA 2		
2Q	SMALLEST DEPARTMENT	CHIEF DEPUTY DIRECTOR in one of the smallest departments with SIGNIFICANT responsibility for policy formulation and line operations.
2B	SMALLEST/SMALL DEPARTMENT	DEPUTY DIRECTOR with responsibility for a SIGNIFICANT program.
2A	MODERATE or LARGE or AGENCY	DEPUTY DIRECTOR with MORE LIMITED LEVEL DEPARTMENT program responsibility.

2E	SMALLEST or SMALL DEPARTMENT	DIVISION CHIEF with SIGNIFICANT program responsibility.
2F	MODERATE DEPARTMENT	DIVISION CHIEF with responsibility for a SIGNIFICANT TECHNICAL program.
2D	LARGE DEPARTMENT	DIVISION CHIEF with responsibility for a program of AVERAGE responsibility and complexity.
2C	AGENCY LEVEL DEPARTMENT	DIVISION CHIEF with MORE LIMITED program responsibilities.
2I	MODERATE DEPARTMENT	PROGRAM MANAGER with a function of AVERAGE responsibility and complexity.
2H	LARGE or LARGEST DEPARTMENT	PROGRAM MANAGER with a CRITICAL program of LIMITED scope.
2G	AGENCY LEVEL DEPARTMENT	PROGRAM MANAGER with MORE LIMITED program responsibilities.
2K	MODERATE or LARGE or AGENCY	High level STAFF SPECIALIST with MAJOR LEVEL DEPARTMENT coordinating or program planning responsibility.
CEA 3		
3A	SMALLEST DEPARTMENT	CHIEF DEPUTY DIRECTOR with a SIGNIFICANT role in formulation of policy and in the management of LINE operations.
3B	SMALL DEPARTMENT	CHIEF DEPUTY DIRECTOR who is a member of the executive staff with LIMITED responsibility for LINE operations.
3D	SMALLEST or SMALL DEPARTMENT	DEPUTY DIRECTOR with responsibility for the department's PRIMARY MISSION.
3C	MODERATE or LARGE or AGENCY LEVEL DEPARTMENT	DEPUTY DIRECTOR with a MORE LIMITED program scope, responsibility, or impact.
3F	MODERATE or LARGE or AGENCY	DIVISION CHIEF with SIGNIFICANT program LEVEL DEPARTMENT responsibility.
3G	LARGEST DEPARTMENT	DIVISION CHIEF with a MORE LIMITED scope of program responsibility.
3J	MODERATE DEPARTMENT	PROGRAM MANAGER with SIGNIFICANT responsibility for a highly TECHNICAL program, e.g., education or engineering.
3I	LARGEST DEPARTMENT	PROGRAM MANAGER with a SIGNIFICANT program responsibility.

3K	AGENCY LEVEL DEPARTMENT	High level LEGAL STAFF SPECIALIST with MAJOR coordinating and program planning responsibility.
3H	SMALL LEGAL PROGRAM	DEPUTY DIRECTOR/DIVISION CHIEF with responsibility for a SMALL LEGAL program.
CEA 4		
4A	SMALLEST or SMALL DEPARTMENT	DIRECTOR with a highly SPECIALIZED mission.
4B	SMALL or MODERATE DEPARTMENT	CHIEF DEPUTY DIRECTOR with a SIGNIFICANT role in formulation of policy and in the management of LINE operations.
4D	MODERATE DEPARTMENT	DEPUTY DIRECTOR with responsibility for the department's PRIMARY program.
4C	LARGE or AGENCY LEVEL DEPARTMENT	DEPUTY DIRECTOR with policy and program responsibility of SIGNIFICANT scope, complexity, or sensitivity.
4F	MODERATE DEPARTMENT	DIVISION CHIEF with responsibility for a highly TECHNICAL program, e.g., engineering or education.
4E	LARGEST DEPARTMENT	DIVISION CHIEF with SIGNIFICANT program responsibility.
CEA 5		
5A	SMALL DEPARTMENT	DIRECTOR with policy and program responsibilities of SIGNIFICANT scope, complexity, or sensitivity.
5B	LARGE DEPARTMENT	CHIEF DEPUTY DIRECTOR
5C	LARGEST DEPARTMENT	DEPUTY DIRECTOR in one of the largest departments with responsibility for a SIGNIFICANT program.
5D	AGENCY LEVEL DEPARTMENT	DEPUTY DIRECTOR with responsibility for the Department's primary mission.

CHIEF ADMINISTRATIVE OFFICER
ALLOCATION STANDARDS

CRITRIA CODE	DEPARTMENT SIZE	CEA CRITERIA
CEA 1		

1D	SMALLEST DEPARTMENT	CAO who has charge of MOST administrative services as well as a MAJOR segment of a (OR ENTIRE) LINE program, reporting to the Director or Chief Deputy Director.
1E	SMALL DEPARTMENT	CAO who has responsibility for a FULL range of administrative services, administering the functions through lower-level administrators, and reporting to a Chief Deputy Director or Director.
CEA 2		
2N	SMALL	CAO who has charge of a FULL range of administrative services as well as a MAJOR segment of the (OR ENTIRE) LINE program, reporting to the Director or Chief Deputy.
2M	MODERATE DEPARTMENT	CAO who has charge of the MAJOR portion but not the full range of administrative functions.
2L	LARGE DEPARTMENT	CAO who reports to a Chief of Administrative Services, and has responsibility for MOST administrative functions of MAJOR consequence, administering the functions through subordinate managers.
2J	LARGEST DEPARTMENT	CAO who reports to an institution or region head, and who is one of a small management team (4 or less) who are responsible for all program and administrative functions of the institution or region.
CEA 3		
3N	SMALL to MODERATE DEPARTMENT	CAO who has charge of a FULL range of administrative services as well as a MAJOR segment of the (OR ENTIRE) LINE program, reporting to a Director or Chief Deputy Director AND where the Director is fully committed to making ALL departmentwide major policy decisions by majority vote of the executive staff of which the incumbent is a member.
3M	MODERATE DEPARTMENT	CAO who has charge of the FULL range of administrative functions and has SIGNIFICANT departmental policy influence.
3L	LARGE DEPARTMENT	CAO who has charge of a FULL range of administrative functions of MAJOR consequence, administering these functions through subordinate managers.
CEA 4		

4G	LARGE DEPARTMENT	CAO who has charge of a FULL range of administrative functions of MAJOR consequence, administering these functions through subordinate line managers, and is responsible for a MAJOR segment of (OR ENTIRE) LINE program.
4H	LARGEST DEPARTMENT	CAO who has charge of the FULL range of administrative functions.

ALLOCATION STANDARDS FOR CEA LEVELS 2 AND 3
WHEN USED BY AN AGENCY

CEA 2

2S ASSISTANT TO THE SECRETARY

Positions at this level typically function as advisors to the Agency Secretary in the formulation and implementation of Agency programs and policies. Incumbents have functional responsibility for programs such as the coordination of resources planning, project evaluation, departmental information programs, or legislative liaison activities within the Agency.

1. Acts as STAFF ASSISTANT to the Agency Secretary in the management and coordination of a MAJOR AGENCY PROGRAM OR PROGRAMS.

2. Serves as a TECHNICAL RESOURCE PERSON to the Agency Secretary for a MAJOR AGENCY GOAL or for an AGENCY FUNCTION such as public relations, legislation, or budgets.

3. Serves as an AGENCY TROUBLE-SHOOTER, identifying problem areas in specific Agency programs crossing departmental lines and involving interdisciplinary functions and policies.

4. Serves as a LIAISON PERSON between the Agency office and other State agencies, the Executive Branch, and other governmental and private agencies.

5. Serves as a GENERAL LIAISON PERSON between the Agency Secretary and one or more of the Agency's operating departments.

6. Represents the Secretary and Chief Deputy Secretary before various committees, boards, commissions, legislative committees, and other civic and governmental organizations.

CEA 3

3S ASSISTANT SECRETARY

Positions at this level typically serve as members of the Secretary's top advisory team. As such, incumbents are full participating members of the Secretary's management group and provide direct input

on all Agency decisions. Incumbents may serve as lead persons over other Agency staff members and/or act with full authority as Agency Secretary in the absence of the Secretary or his/her Chief Deputy.

1. Acts as a full participating member of the Secretary's decision-making team. Typically provides input on all sensitive and complex Agency decisions.

2. Acts as STAFF ASSISTANT to the Agency Secretary in the management and coordination of MAJOR AGENCY PROGRAMS which cross departmental lines and involve interdisciplinary functions and policies. Typically, incumbents have contacts with departmental directors and other high-level personnel in the Executive Branch and other State agencies.

3. Serves as a STATEWIDE COORDINATOR of a MAJOR program which is HIGHLY SENSITIVE and COMPLEX, such as energy conservation and planning or employer-employee relations. Typically, such assignments include serving as the Secretary or Governor's personal representative to high-level boards or commissions.

4. Represents the Secretary and Chief Deputy Secretary at Cabinet, sub-Cabinet, and the Legislature.

5. May act as a LEAD PERSON over one or more Assistant to the Secretary positions and other Agency technical staff while performing as chief coordinator of a program critical to the mission of the Agency.

6. May act with full authority to commit all or a significant part of an Agency's resources in the absence of the Agency Secretary and Chief Deputy.

7. Represents the Secretary, Chief Deputy, and/or the State of California on the highest level committees, boards, commissions, and before other civic and governmental organizations. Typically, such representation constitutes full membership and participation in all policy decision making.

SPEC: CHIEF CONSTRUCTION SUPERVISOR
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	IS10
Class Code:	4025
Established:	11/2/62
Revised:	3/30/78
Title Changed:	--

CHIEF CONSTRUCTION SUPERVISOR

DEFINITION

Under general direction, to plan, direct and to be responsible for the coordination of the work of the Construction Services Section of the Office of the State Architect; and to do other related work.

TYPICAL TASKS

Plans, organizes, directs, and coordinates the work of the construction sections of the Office of the State Architect in the construction, restoration, alteration, or repair of State buildings and other structures; plans and directs the work, gives instructions, and passes on difficult construction inspection programs; confers with heads of institutions, office section heads, contractors, and superiors on matters connected with the construction programs; passes upon questionable construction materials; prepares comprehensive technical reports, appears before and serves on boards and committees as directed; addresses interested groups on the work of the Office of the State Architect and acts for the Deputy, Operations, as assigned.

MINIMUM QUALIFICATIONS

Either I

One year of experience performing the duties of a Construction Supervisor IV in the California state service; or

Two years of experience performing the duties of a Construction Supervisor III in the California state service.

Or II

Experience: Broad and extensive experience (more than five years), involving the performance of increasingly complex duties, at least two years of which shall have been in a high level supervisory, administrative or executive capacity in a headquarters unit of a large construction organization, or in charge of constructing a group of major projects in an assigned territory or district. (Experience in California state service applied toward this requirement must include at least two years performing duties equivalent to Construction Supervisor III.) and

Education: Equivalent to graduation from college with major work in engineering or architecture. (Additional qualifying experience may

be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: The principles, methods and processes involved in the construction of wood, steel, concrete and masonry buildings; the strength, properties, and uses of the materials of building construction and the State Contract Act, and various State building specifications; principles and practices of administration in the direction of large construction operations; the principles and techniques of personnel management and supervision; the general principles of labor relations; building and other codes and safety orders applying generally to building construction; Department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Interpret contract plans and specifications in terms of State and contractor responsibilities; develop acceptable and legal alternatives to construction problems; make sound construction and contract decisions; speak effectively and make oral presentations; detect faulty and improper materials and workmanship in building and allied construction; establish and maintain cooperative relations with those contacted in the work; dictate correspondence and write clear and comprehensive reports; effectively contribute to the Department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTICS

Tact and keenness of observation; demonstrated managerial and administrative ability; understanding of and effectiveness in carrying out State and departmental equal employment opportunity and affirmative action policies.

SPEC: CHIEF COUNSEL
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

CHIEF COUNSEL
Series Specification
(Established July 1, 1973)

SCOPE

This series specification describes three legal management positions used in various State departments.

Schem Code	Class Code	Class
OB10	5871	Assistant Chief Counsel
OB20	5872	Chief Counsel I, C.E.A.
OB30	5873	Chief Counsel II, C.E.A.

DEFINITION OF SERIES

The Chief Counsel series describes three classifications which have responsibility for the legal program of various State departments. This includes responsibility for planning, organizing, directing, coordinating, and reviewing the work of a professional legal staff; acting as legal advisor to top management; preparing legislation and representing the Department before the Legislature; formulating legal policy; and participating as a member of top management in the development and implementation of department policy.

ENTRY LEVELS

Entry into this series would be typically by experienced attorneys in State service.

FACTORS AFFECTING POSITION ALLOCATION:

Size of legal program, degree of general policy involvement, extent to which positions influence legal policy, complexity of legal work and impact of legal program.

DEFINITION OF LEVELS

ASSISTANT CHIEF COUNSEL

Works under the general direction of a Chief Counsel II, C.E.A., in planning, organizing, directing, coordinating and reviewing the work of a major legal section of a large legal office.

CHIEF COUNSEL I, C.E.A.

This is typically the top legal position in a Department with a

relatively small legal program having responsibility for planning, organizing, directing, coordinating and reviewing the work of a legal staff.

CHIEF COUNSEL II, C.E.A.

This is the top legal position in a department with one of the State's larger legal programs having responsibility for planning, organizing, directing, coordinating and reviewing the work of a legal staff.

MINIMUM QUALIFICATIONS

ASSISTANT CHIEF COUNSEL

Membership in The State Bar of California. (Applicants must have active membership in The State Bar before they will be eligible for appointment.)

and

Either I

Two years of experience in the California state service performing legal duties* at a level of responsibility equivalent to Staff Counsel, Range D. (Applicants who have completed 18 months of the required experience will be admitted to the examination, but must complete two years of such experience before they will be eligible for appointment.)

Or II

Broad and extensive experience (more than five years) in the practice of law*. (Experience in California state service applied toward this requirement must include the same number of years of qualifying experience as required in Pattern I above performing the duties of a class at a level of responsibility equivalent to that described in Pattern I.)

CHIEF COUNSEL I, C.E.A.

Membership in The State Bar of California. (Applicants must have active membership in The State Bar before they will be eligible for appointment.)

and

Either I

Two years of experience in the California state service performing legal duties* at a level of responsibility equivalent to Staff Counsel, Range D. (Applicants who have completed 18 months of the required experience will be admitted to the examination, but must complete two years of such experience before they will be eligible for appointment.)

*Experience in the "practice of law" or "performing legal duties" is defined as only that legal experience acquired after admission to The Bar.

Or II

Broad and extensive experience (more than five years) in the practice of law*. (Experience in California state service applied toward this requirement must include the same number of years of qualifying experience as required in Pattern I above performing the duties of a class at a level of responsibility equivalent to that described in

Pattern I.)

CHIEF COUNSEL II, C.E.A.

Membership in The State Bar of California. (Applicants must have active membership in The State Bar before they will be eligible for appointment.)

and

Either I

One year of experience in the California state service performing legal duties* at a level of responsibility equivalent to Assistant Chief Counsel.

Or II

Two years of experience in the California state service performing legal duties* at a level of responsibility equivalent to Staff Counsel, Range D; and Current employment in a class at a level equivalent to that of Senior Staff Counsel (Specialist) or (Supervisor).

Or III

One year of experience in the California state service performing legal duties* at a level of responsibility equivalent to Senior Staff Counsel (Specialist) or (Supervisor).

Or IV

Broad and extensive experience (more than five years) in the practice of law*. (Experience in California state service applied toward this requirement must include the same number of years of qualifying experience as required in Patterns I, II or III above performing the duties of a class at a level of responsibility equivalent to that described in Patterns I, II, or III.)

KNOWLEDGE AND ABILITIES

ALL LEVELS

Knowledge of: Legal principles and their applications; legal research methods, court procedures, rules of evidence and procedure; administrative law and the conduct of proceedings before administrative bodies; provisions of laws and Government Code sections administered or enforced; principles of public administration, personnel management and supervision; the department's affirmative action program objectives; a manager's role in the affirmative action program and the processes available to meet affirmative action objectives.

Ability to: Analyze legal principles and precedents and apply them to complex legal and administrative problems; present statements of fact, law and argument clearly and logically in written and oral form; draft opinions, pleadings, rulings, regulations and legislation; hold hearings and independently present difficult and complex cases in court; plan, organize and direct the work of a staff of attorneys; effectively contribute to the department's affirmative action objectives.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed

Assistant Chief Counsel 7/1/73 -- 12/17/85
--
Chief Counsel I, C.E.A. 7/1/73 7/1/73
12/17/85 --
Chief Counsel II, C.E.A. 7/1/73 7/1/73 12/17/85
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*Experience in the "practice of law" or "performing legal duties" is defined as only that legal experience acquired after admission to The Bar.

SPEC: COMPUTER OPERATIONS SPEC
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

COMPUTER OPERATIONS
Series Specification
(Established August 6, 1969)

SCOPE

This series specification describes five information technology systems operations classes used in State service. Classes in this series operate the main information technology systems console, multiple on-line teleprocessing systems, auxiliary consoles, and peripheral equipment on information technology systems, perform technical analysis, and may supervise or act as a leadperson for others in the performance of information technology systems operating duties. The factors affecting position allocation include: the complexity, scope, and variety of work; independence of action and decision; size, operating mode, and sophistication of the information processing system; consequence of decision; and supervision exercised and received. The degree and amount of responsibility for the operations of the main console on those systems characterized by multiprocessing, variable tasks operations or responsibility for coordination of multiple on-line teleprocessing systems, and technical analysis are the basic factors.

Entry into this series is typically from outside State service or from other State classes performing duties in support of information technology systems activities.

Schem Code	Class Code	Class
LN40	1353	Computer Operator
LN25	1560	Computer Operations Specialist I
LN20	1351	Computer Operations Supervisor I
LN15	1561	Computer Operations Specialist II
LN10	1350	Computer Operations Supervisor II

DEFINITION OF LEVELS*

COMPUTER OPERATOR

This deep class includes ranges comprising the entry, trainee, and journeyperson/working leadperson levels in this series. Incumbents in lower ranges of the class, under close supervision, learn to operate the less sophisticated information technology systems consoles or machine control panels; assist in the operation of the more complex information technology systems consoles or machine control panels; and in response to messages from information technology systems consoles, operate peripheral equipment such as tape units.

As training progresses, incumbents under general supervision may work with and provide general direction to a small group of computer operators engaged in the operation of an information technology processing system. Incumbents have primary responsibility for the operation of the main console on small- to medium-sized information processing systems, and/or may perform technical duties in

specialized areas.

COMPUTER OPERATIONS SPECIALIST I

Under general supervision, operates the main information technology systems console on more complex multiprocessing variable task information processing systems; coordinates complex, multiterminal teleprocessing systems; performs complex technical duties in other related areas as assigned, such as use of utility programs, vendor coordination, scheduling functions, performing monitoring equipment maintenance tracking and procedure development, and assisting with planning and implementing new or modified telecommunications networks/systems; the installation and maintenance of computer/network hardware; developing and providing information technology systems operations training. Incumbents may act in a lead capacity over a small technical staff.

COMPUTER OPERATIONS SUPERVISOR I

Under direction, supervises a small- to medium-sized group of information technology systems operations staff in the operations phase of an information systems installation.

COMPUTER OPERATIONS SPECIALIST II

Under direction, in a large information systems installation, has primary responsibility for operating the main information systems console on the most complex multiprocessing variable task information technology systems or coordinating complex, multiterminal teleprocessing systems, and/or performing complex technical duties in other related areas as assigned, such as assisting with planning and implementing new or modified telecommunications networks/systems; developing and providing information technology systems operations training; the installation and maintenance of computer/networks hardware; and solving unusually complex problems requiring high vendor/user contact.

Incumbents may act in a lead capacity over a small technical staff.

COMPUTER OPERATIONS SUPERVISOR II

Under general direction, plans, organizes, and directs the activities of a major phase of the operations or administrative section of a large information technology systems installation or performs equivalent supervisory duties.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Unless otherwise stated, experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other to meet the total experience requirement.

COMPUTER OPERATOR

Either I

Two years of work experience performing duties comparable to those of an Office Assistant (Range B) in the California state service and at least three semester units or four quarter units from a recognized college or university in information technology-related coursework.

Or II

One year of experience performing technician duties in operation, quality control, or scheduling on an information technology system.

Or III

Twelve semester units or eighteen quarter units from a recognized college or university in information technology-related coursework or equivalent academic training provided from an accredited institution recognized by the Accrediting Council for Independent Colleges and Schools (ACICS) or the Accrediting Commission of Career Schools and Colleges of Technology (ACCSCT). The ACICS or ACCSCT must cite the institution as being accredited for the relevant program being considered for qualification. (Partial completion of the requirement may not be combined with the other patterns to meet minimum qualifications.)

COMPUTER OPERATIONS SPECIALIST I
COMPUTER OPERATIONS SUPERVISOR I

Either I

One year of experience in the California state service performing the duties comparable to those of a Computer Operator (Range C).

Or II

Eighteen months of experience performing the full range of duties in operating an information technology system or operating a main console in a multiprocessing, variable task information technology system. At least one year of this experience must include primary responsibility for the operation of the main console on information processing systems.

Or III

1. Completion of at least 60 semester or 90 quarter units at a recognized college or university, of which 12 semester or 18 quarter units are comprised of information technology related coursework. or

2. Equivalent academic training provided from an accredited institution recognized by the Accrediting Council for Independent Colleges and Schools (ACICS) or the Accrediting Commission of Career Schools and Colleges of Technology (ACCSCT). The ACICS or ACCSCT must cite the institution as being accredited for the relevant program being considered for qualification. (Partial completion of the requirement may not be combined with the other patterns to meet minimum qualifications.)

COMPUTER OPERATIONS SPECIALIST II
COMPUTER OPERATIONS SUPERVISOR II

Either I

One year of experience in the California state service performing duties comparable to those of a Computer Operations Specialist I or Computer Operations Supervisor I.

Or II

Two years of experience performing the full range of duties in operating an information technology system or operating a main console in a multiprocessing, variable task information technology system. At least one year of this experience must include operation of the main information technology systems console on more complex multiprocessing variable task information processing systems; coordination of complex, multiterminal teleprocessing systems;

performing monitoring equipment maintenance tracking and procedure development; assisting with planning and implementing new or modified telecommunications networks/systems; the installation and maintenance of computer/network hardware; and developing and providing information technology systems operations training.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Principles, capabilities, and operation of information technology systems and related peripheral equipment.

Ability to: Recognize and work out solutions for operational problems; communicate effectively; analyze data; work cooperatively with others and gain their respect and confidence; perform arithmetical computations.

COMPUTER OPERATIONS SPECIALIST I
COMPUTER OPERATIONS SPECIALIST II

Knowledge of: In addition to the above, information technology systems hardware and operating techniques; basic concepts of operating systems; modern office procedures and equipment; methods of devising standard machine and operator production rates.

Ability to: In addition to the above, react promptly and appropriately to unique situations; maximize information technology system operating efficiency; develop forms and procedures.

COMPUTER OPERATIONS SUPERVISOR I

Knowledge of: All of the above, and information technology systems operations procedures and equipment; methods of devising operator production rates; principles of effective supervision and training; the department's Equal Employment Opportunity objectives; a manager's role in the Equal Employment Opportunity and the processes available to meet equal employment objectives.

Ability to: All of the above, and plan, organize, and direct the operation of an information technology system; supervise the work of technical and clerical assistants; effectively contribute to the department's equal employment objectives.

COMPUTER OPERATIONS SUPERVISOR II

Knowledge of: All of the above, and principles of organization and personnel management.

Ability to: All of the above, and supervise the work of technical and clerical assistants in a complex information technology system.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Frequently assignments require work on rotation shifts, holidays, odd shifts, and overtime including evenings, nights, and weekends.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Computer Operator	6/3/65	5/2/01	--
Computer Operations Specialist I	3/20/84	5/2/01	--
Computer Operations Supervisor I	6/3/65	5/2/01	--
Computer Operations Specialist II	3/20/84	5/2/01	--
Computer Operations Supervisor II	6/3/65	5/2/01	--

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* Additional information regarding functions performed, complexity factors, and scope of responsibility is contained in a separate document titled "Allocation Guidelines."

SPEC: DATA PROCESSING MANAGER
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

DATA PROCESSING MANAGER
Series Specification
(Established June 6, 1968)

SCOPE

This series specification describes four levels used throughout State service in the management and planning of data processing systems development, ongoing applications processing, and all phases of the operation of a computer installation. Incumbents in this series typically have an EDP background and demonstrate strong analytical and communication skills, managerial abilities and possess personal qualifications necessary to succeed in managing data processing activities and personnel. They typically prepare budget estimates for their units; plan and schedule EDP workload; staff to achieve goals; coordinate between users and EDP specialists; monitor and control projects in accordance with established plans; and do other related work. At the higher levels within a departmental or agency setting, a Data Processing Manager establishes planning processes to ensure the most effective use of data processing.

Schem Code	Class Code	Class
LK31	1381	Data Processing Manager I
LK21	1384	Data Processing Manager II
LK15	1393	Data Processing Manager III
LK11	1387	Data Processing Manager IV

ENTRY LEVELS

Entry into the series is typically from the EDP Associate levels.

FACTORS AFFECTING POSITION ALLOCATION

Scope of administrative responsibility, complexity of assigned work, reporting relationship, size of the EDP organization, and impact of decisions.

DEFINITION OF LEVELS

DATA PROCESSING MANAGER I

This is the first full management level responsible for planning, organizing, coordinating and reviewing the activities of a data processing staff through subordinate supervisors or may (1) direct all activities in a small EDP organization with responsibility for any combination of analysis, programming, processing, computer operation, and related functions, or (2) direct a group of data processing analysts at the journeyperson level.

PROCESSING MANAGER II

This is the second level of management in a medium to large EDP organization requiring subordinate managers at the Data Processing Manager I level with responsibility for analysis, programming, processing, computer operations or other related EDP functions or may (1) direct a large unit of analysts or programmers, or (2) direct a combination of EDP functions representing an equivalent level of responsibility, or (3) direct all activities of a small, complex EDP organization, or (4) direct the computer operations of a large to very large EDP organization serving multiple departments.

DATA PROCESSING MANAGER III

The incumbent has full management responsibility for a medium size EDP organization or directs a major data processing function or functions in a large, complex EDP organization requiring subordinate managers at the Data Processing Manager II level or may (1) direct and coordinate a highly complex project which impacts on multiple departments, or (2) direct a program involving the development and administration of servicewide EDP plans, policies, procedures, and standards, or (3) function as a project manager responsible for designing, configuring, and developing the most technically advanced business solution/EDP projects.

DATA PROCESSING MANAGER IV

The incumbent has full management responsibility for a large EDP organization requiring subordinate managers at the Data Processing Manager II and III levels or may (1) directly under the manager of one of the largest EDP organizations, manage a significant portion of the organization, or (2) direct a highly complex, interdepartmental project where the work is of the most critical and sensitive nature.

MINIMUM QUALIFICATIONS

DATA PROCESSING MANAGER I

Either I

One year of experience in the California state service performing electronic data processing duties of a class with a level of responsibility equivalent to Information Systems Technician Supervisor II.

Or II

Four years of progressively responsible experience in EDP systems design, programming, or operations, at least two years of which shall have been in a supervisory assignment. (Experience in the California state service applied toward this requirement must include one year performing the duties of a class with a level of responsibility equivalent to Information Systems Technician Supervisor II.)

DATA PROCESSING MANAGER II

Either I

One year of experience in the California state service performing

electronic data processing duties of a class with a level of responsibility equivalent to Data Processing Manager I.

Or II

Five years of progressively responsible experience in EDP system design, programming, or operations, at least one year of which shall have been in a management assignment. (Experience in the California state service applied toward this requirement must include one year performing the duties of a class with a level of responsibility equivalent to Data Processing Manager I.)

DATA PROCESSING MANAGER III

Either I

Two years of experience in the California state service performing electronic data processing duties in a class with a level of responsibility equivalent to Data Processing Manager I, at least one year of which shall have been in a management assignment.

Or II

Three years of experience directing all phases of the operation of a large electronic data processing installation. (Experience in the California state service applied toward this requirement must include one year performing the duties of a class with a level of responsibility equivalent to Data Processing Manager II.)

DATA PROCESSING MANAGER IV

Either I

Two years of experience in the California state service performing the duties of a Data Processing Manager II. (Persons who have completed two years of experience performing EDP duties of a class with a level of responsibility equivalent to Data Processing Manager II may substitute on a year-for-year basis up to two years of other managerial experience at the Data Processing Manager II level and may substitute up to one year of managerial experience at a lower level.)

Or II

Four years of experience directing all phases of the operation of a large electronic data processing installation. (Experience in the California state service applied toward this requirement must include one year performing the duties of a class with a level of responsibility equivalent to Data Processing Manager III.)

ALL LEVELS:

Education Experience:

The following educational background is required of all competitors who wish to be given credit for experience under the outside experience pattern for any level:

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Principles, practices, and trends of public administration, including management, organization, planning, cost/benefit analysis, budgeting, and project management and evaluation; employee supervision, training, development and personnel management; current computer industry technology and practices; principles of data processing systems design, programming, operations, and controls; State level policies and procedures relating to EDP; the department's goals and policies; department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Develop and evaluate alternatives, make decisions and take appropriate action; establish and maintain priorities; effectively develop and use resources; identify the need for and assure the establishment of appropriate administrative procedures; plan, coordinate and direct the activities of a data processing staff; make effective use of interdisciplinary teams; reason logically and creatively and use a variety of analytical techniques to resolve managerial problems; present ideas and information effectively, both orally and in writing; consult with and advise administrators and other interested parties on a variety of subject-matter areas, translating technical data processing terms into everyday language; gain and maintain the confidence and cooperation of others; and effectively contribute to the department's affirmative action objectives.

DATA PROCESSING MANAGER III
DATA PROCESSING MANAGER IV

Knowledge of: All of the above, and principles of the governmental functions and organizations at the State level, including the legislative process.

SPECIAL PERSONAL REQUIREMENTS

ALL LEVELS:

Demonstrated ability to act independently with flexibility and tact.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

In appraising the relative qualifications of candidates for all levels, consideration will be given to the extent and type of experience related to the electronic data processing functions listed in the "Scope" of this specification and to the extent and type of pertinent education beyond that required under "Minimum Qualifications". Preferred additional education includes courses in public administration.

CLASS HISTORY

Date	Date	Title

Class	Established	Revised	Changed
Data Processing Manager I	6/6/68	12/13/78	--
Data Processing Manager II	6/6/68	7/23/91	--
Data Processing Manager III	6/6/68	6/20/95	--
Data Processing Manager IV	6/6/68	12/13/78	--

SPEC: DIGITAL COMPOSITION SPECIALIST SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

DIGITAL COMPOSITION SPECIALIST
Series Specification
(Established January 19, 2000)

SCOPE

This series specification describes three classes in the California state service that electronically produce a finished product for digital and print publication, display or on-line usage, utilizing text, graphic art work, and all other elements needed.

Schem Code	Class Code	Class
RH88	7255	Digital Composition Specialist I
RH86	7256	Digital Composition Specialist II
RH84	7258	Digital Composition Specialist III

DEFINITION OF SERIES

Digital Composition Specialist positions utilize a variety of typesetting, page layout, graphic, and scanning software operating on multiple computer platforms in the preparation and layout of forms, publications, brochures, and other display materials. Incumbents work from copy or digital media to plan and prepare camera-ready copy or electronic files for the traditional or digital publication of forms, charts, diagrams, publications, brochures, etc. Incumbents may consult with clients to determine an agreed-upon end product and make recommendations for proper job specifications and design/layout enhancements. Incumbents exercise a great deal of independence through the operation and manipulation of a variety of hardware and software applications in the development of print and digital publications; and do other related work.

DEFINITION OF LEVELS*

DIGITAL COMPOSITION SPECIALIST I

The Digital Composition Specialist I is the entry and first working level for the series. Under general supervision,

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* Additional information regarding functions performed, complexity factors, and scope of responsibility is contained in a separate document titled "Allocation Guidelines."

incumbents perform the less complex work and prepare camera-ready copy for the traditional or digital publication of forms, charts, diagrams, documents, brochures, and other printed material. The level of complexity of the work and utilization of sophisticated software applications will increase as incumbents become knowledgeable to effectively and efficiently produce the desired product.

DIGITAL COMPOSITION SPECIALIST II

The Digital Composition Specialist II is the full journey level for the series. Under direction, incumbents routinely perform complex work utilizing the full range of equipment and software applications. Incumbents consult with clients and make recommendations for creating the desired product. Incumbents independently import or scan text and graphics for manipulation and placement to create the desired effects. The position is responsible for developing a product that is compatible with the chosen method/type of publishing/printing process. Incumbents are also expected to maintain high-tech equipment, troubleshoot software/hardware problems, and may work with programming/technician staff to resolve, develop, and implement procedures to maintain file integrity and version control, research new and updated software and fonts, make recommendations for purchases, assist in preparation for justifications, and train staff. Incumbents may also assume lead responsibilities as described above.

DIGITAL COMPOSITION SPECIALIST III

The Digital Composition Specialist III is the advanced journey level of the series. Under direction, incumbents perform the most complex work utilizing high-end software and a variety of equipment in developing layout formats for final publication to meet client specifications. Typical tasks include, but are not limited to, reviewing electronic files and assigning or editing color elements according to specifications; electronically making full range color corrections of full color pictures as directed by the client; reviewing trapping requirements for multicolor and 4-color process work; performing basic programming that guide the user in preparing "intelligent" electronic forms; may encode documents to create coded programs which describe page layouts; and reformatting documents for placement on the Internet. Incumbents exercise the highest degree of judgment in determining the most appropriate technique, preparation, and set up of the electronic file for production, and understanding the key variables to be adjusted. The Digital Composition Specialist III is the troubleshooter for identification of publication problems.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Equivalent to completion of the twelfth grade.

DIGITAL COMPOSITION SPECIALIST I

Either I

Six months of education/experience in the California state service performing the duties equivalent to a Word Processing Technician, Range A, within a printing, publishing, duplicating, reproduction, layout, or imposition related field.

Or II

Six months of varied experience in the application of page layout or graphic design software for use in the creation of publications.

Or III

Possession of a postsecondary certificate of completion of a business or vocational course of study in page layout and/or graphic design software with an emphasis on publishing applications.

DIGITAL COMPOSITION SPECIALIST II

Either I

One year of experience in the California state service performing the duties of a Digital Composition Specialist I, Range B.

Or II

Three years of experience in the application of page layout or graphic design software for use in the creation of forms, charts, business cards, letterhead, envelopes, newsletters, announcements, diagrams, brochures, or other publications.

Or III

Two years of experience in the application of page layout or graphic design software for use in the creation of forms, charts, business cards, letterhead, envelopes, newsletters, announcements, diagrams, brochures, or other publications; and possession of a postsecondary certificate of completion of a business or vocational course of study in page layout and/or graphic design software with an emphasis on publishing.

DIGITAL COMPOSITION SPECIALIST III

Either I

One year of experience in the California state service performing the duties of a Digital Composition Specialist II.

Or II

Four years of broad and extensive experience in the application of page layout or graphic design software for use in the creation of forms, charts, business cards, letterhead, envelopes, newsletters, announcements, diagrams, brochures, or other publications.

Or III

Three years of broad and extensive experience in the application of page layout or graphic design software for use in the creation of forms, charts, business cards, letterhead, envelopes, newsletters, announcements, diagrams, brochures, or other publications; and possession of a postsecondary certificate of completion of a business or vocational course of study in page layout and/or graphic design software with an emphasis on publishing.

KNOWLEDGE AND ABILITIES

DIGITAL COMPOSITION SPECIALIST I

Knowledge of: Proper punctuation, spelling, and grammar; basic printing typography including fonts, point sizes, and spacing; page layout software; computer operating systems; basic printing and publishing terminology; proper equipment maintenance; page design; basic mathematical computations; basic principles, capabilities, and operation of computer systems; inks, paper, and other material used in publication manufacturing processes; preparation of materials to be used in publishing.

Ability to: Communicate effectively; learn and apply office policies, rules, regulations, and procedures; follow oral and written directions; use specialized software applications in the composition of various publications; convert and transmit electronic files; respond to multiple work priorities.

DIGITAL COMPOSITION SPECIALIST II

Knowledge of: All of the above, and methods, equipment, and

materials used in form design and layout techniques, composition, offset printing, and electronic publishing; color theory; color separation and imposition; computer networks.

Ability to: All of the above, and independently plan, typeset, and prepare copy for publication; prepare files for imaging; identify software/hardware problems associated with the creation and production of text and graphics; interpret job specifications; select and apply page imposition; maintain output devices and may calibrate if necessary; create files suitable for electronic publishing; create digital proofs for client approval; train other staff on software application and development of forms and publications; consult with customers on proper file preparation for the publication process; analyze critical and problematic situations and make recommendations for appropriate action.

DIGITAL COMPOSITION SPECIALIST III

Knowledge of: All of the above, and color separations for 4-color process printing; basic computer programming techniques; basic relational databases.

Ability to: All of the above, and discern key issues from complex production problems and develop or negotiate effective solutions; identify system/equipment incompatibilities; instruct customers in all technical aspects of file preparation; perform complex electronic file conversions; perform basic programming.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Willingness to work at night and overtime; color vision sufficient to perform the essential functions of the job; work as a member of a team; and work cooperatively and interact courteously with all levels of staff, customers, vendors, and other parties.

CLASS HISTORY

	Date Established	Date Revised	Title Changed
Digital Composition Specialist I	1/19/00	--	--
Digital Composition Specialist II	1/19/00	--	--
Digital Composition Specialist III	4/30/81	1/19/00	1/19/00

SPEC: DIGITAL PRINT OPERATOR SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

DIGITAL PRINT OPERATOR
Series Specification
(Established January 19, 2000)

Schem Code	Class Code	Class
CL35	1411	Digital Print Operator I
CL30	1412	Digital Print Operator II

DEFINITION OF SERIES

This consolidated series specification describes two levels of Digital Print Operators that are responsible for the completion of high-speed duplication and/or digital printing. Work includes receiving or obtaining master material from either hard copies or electronic images, preparing the master copy and reprographic equipment for reproduction, completing the assigned print jobs, proofing work, completing minor maintenance and repairs on equipment, setting up printing and finishing equipment, performing the finishing tasks needed to complete the assigned print jobs, fulfilling ancillary tasks related to reprographic work (training, maintaining multiple logbooks and other record-keeping documents, ordering supplies, etc.), and performing other related work. Completion of this work is expected to adhere to safe printing and equipment practices and follow all precautions provided on machines and operating manuals.

DEFINITION OF LEVELS*

DIGITAL PRINT OPERATOR I

This is the entry and first journey level in the series. Under general supervision, incumbents perform a variety of complex tasks associated with completing high-speed duplication and/or digital printing work. This work includes entering commands into the equipment being operated, performing the less complex digital manipulations needed to prepare the printing job, and performing the finishing tasks associated with the assigned printing jobs.

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* Additional information regarding functions performed, complexity factors, and scope of responsibility is contained in a separate document titled "Allocation Guidelines."

DIGITAL PRINT OPERATOR II

This is the full journey level in the series. Under direction, incumbents are responsible for completing printing jobs that

require the execution of the full range of complex operating commands and electronic manipulation functions. They perform the tasks needed to prepare, operate, and maintain a variety of digital printing equipment including their finishing attachments. Incumbents may serve in a lead capacity.

MINIMUM QUALIFICATIONS

DIGITAL PRINT OPERATOR I

Either I

In the California state service, one year of experience equivalent to an Office Assistant (General) or Bookbinder I.

Or II

Two years of experience performing general clerical duties that include operation of general office equipment including but not limited to photocopiers, laser printers, and word processing equipment.

DIGITAL PRINT OPERATOR II

Either I

In the California state service, one year performing the duties of a Digital Print Operator I.

Or II

Two years of experience performing progressively more difficult printing duties that include operation of high-speed duplication or digital print equipment.

KNOWLEDGE AND ABILITIES

DIGITAL PRINT OPERATOR I

Knowledge of: Principles and procedures used to operate high-speed or digital print equipment; papers and tools used in high-speed print duplication; record-keeping practices, supply inventory, and requisition processes; basic electronics and computer commands used to operate digital print equipment; safety requirements applied in the operation of large equipment; industrial workplace safety practices.

Ability to: Operate digital print equipment; perform minor repairs; prepare job for shipment; follow oral and written instructions used to complete printing jobs; organize, prioritize, schedule, and structure multiple work tasks in order to optimize efficient use of print capabilities; identify minor problems with print jobs or equipment and make corrections; take measurements using fractions and apply basic mathematical functions (addition, subtraction, multiplication, and division); set up and operate various types of finishing equipment including hydraulic drills, cutters, heavy-duty stitchers, and comb binding machines; interact effectively and courteously with all levels of personnel, customers, vendors, and other parties; move and/or lift up to 50 pounds; stand for long periods of time.

DIGITAL PRINT OPERATOR II

Knowledge of: All of the above, and computer operation principles and processes used to operate digital print equipment; principles

and techniques used to modify digital print images and products.

Ability to: All of the above, and retrieve and save electronic files; electronically manipulate printing files and jobs including sizing, cropping, masking, rotating images, shading, watermarks, stretching, merging from merged files, and mail merging; electronically manipulate colors; learn new software application programs.

SPECIAL CHARACTERISTICS

BOTH LEVELS:

Flexibility to adapt to changing work priorities; willingness to work in a noisy environment; and willingness to work nights and overtime. May require color vision sufficient to perform essential functions of jobs involving color printing.

ADDITIONAL DESIRABLE QUALIFICATIONS

BOTH LEVELS:

Graduation from high school or its equivalent.

DIGITAL PRINT OPERATOR II

Knowledge of more than one software application program.

CLASS HISTORY

	Date Established	Date Revised	Title Changed
Digital Print Operator I	1/19/00	--	--
Digital Print Operator II	1/19/00	--	--

CALIFORNIA STATE PERSONNEL BOARD
SPECIFICATION

Schematic Code: CD40
Class Code: 1728
Established: 09/03/1986
Revised: --
Title Changed: --

EXECUTIVE ASSISTANT

DEFINITION

Under direction of a high level administrator, to provide staff assistance on sensitive departmental or program issues; to provide administrative assistance and secretarial support; to provide office management, supervisory and other staff and office services; and to do other related work.

JOB CHARACTERISTICS

Positions may be allocated to the Executive Assistant only when the administrator to whom the position reports is (1) at least CEA II/ Exempt Level K/Principal level and at or above the second organizational level, or (2) at least CEA III/Exempt Level H and at or above the third organizational level.

TYPICAL TASKS

Researches confidential and sensitive departmental or program issues; using microcomputers and/or video display terminals, accesses inputs, revises and extends information contained in the data banks; screens, redirects and/or responds to telephone calls and written inquiries from the Governor's Office and Legislature and other high level contacts on behalf of the Administrator; maintains the administrator's working schedule and calendar; develops and implements computer-based management information systems for the administrator; implements computer-based office management systems; follows up on projects and requests assigned to programs; as delegated by the administrator, reviews materials submitted by programs for format, content and grammar; develops or assists in the development of office workload and planning standards, staffing requirements and budgets; prepares and signs correspondence in the absence of the administrator; directs the activities of the support staff of the administrator's office; supervises subordinate staff; establishes office procedures and operating systems; provides and/or directs the typing and secretarial support services for the administrator.

DISTINGUISHING CHARACTERISTICS

This class is distinguished from the Administrative Assistant classes in that employees in this class are regularly called upon to provide secretarial tasks a significant portion of the time. This class is distinguished from classes in the Secretary series in that employees in the class are responsible for relieving an administrator of assigned administrative detail, for carrying out assignments on their own initiative and for obtaining facts on which decisions are made. These activities are performed a significant portion of the time in addition to the secretarial duties.

MINIMUM QUALIFICATIONS

Either I

One year of experience in the California state service performing secretarial

duties at a level of responsibility not less than those of an Executive Secretary I or two years of secretarial experience in the California state service at a level of responsibility not less than Secretary or Office Technician.

Or II

One year of experience performing technical duties in the California state service in a class comparable in level of responsibility to Management Services Technician.

Or III

Four years of experience as a Secretary or Administrative Assistant outside of California state service of which at least one year must have been at the level of responsibility of Executive Secretary I or Management Services Technician or at least two years must have been at the level of responsibility of Secretary or Office Technician. (Up to two years of intensified secretarial training in an approved curriculum or college level course work in business, personnel or public administration may be substituted for the general outside experience on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: The principles and methods of public and business administration; office management principles, methods and procedures; good personnel and fiscal management practices; the organization's relationship with other governmental entities; the administrator's responsibilities with regard to the organization's programs; the functions, programs and operations in the Administrator's area of responsibility; the principles and practices of supervision; the Department's Affirmative Action Program objectives; a supervisor's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Think clearly and analyze problems of organization and management and take effective action; handle sensitive and confidential assignments with tact and diplomacy; work under pressure and time constraints; handle changing priorities; establish and maintain cooperative working relationships; communicate effectively; type at a speed of 45 words per minute; supervise the work of others; effectively contribute to the department's affirmative action objectives.

ADDITIONAL DESIRABLE QUALIFICATIONS

Familiarity with microcomputers, personal computers and/or video display terminals and their capabilities.

SPEC: EXPERT EXAMINER

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LA80
Class Code:	8895
Established:	4/16/37
Revised:	7/21/77
Title Changed:	11/7/40

EXPERT EXAMINER

DEFINITION

Under general direction, to give expert assistance to a State agency in the conduct of examinations to select applicants for employment or to determine the qualifications of applicants for a professional or vocational license; and to do other work as required.

MINIMUM QUALIFICATIONS

Either IExtensive experience in a responsible capacity in the field in which the examinations are being given.
Or IICompletion of the State Personnel Board course for qualifications appraisal panel chairpersons and/or demonstrated experience in interviewing.

SPEC: FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION) SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

FOREST PROPERTY APPRAISER
(BOARD OF EQUALIZATION)
Series Specification
(Established September 4, 1974)

SCOPE

This series specification describes three Forest Property Appraiser classifications used in the State Board of Equalization's Property Taxes Program.

Schem Code	Class Code	Class
KU50	5018	Assistant Forest Property Appraiser (Board of Equalization)
KU40	5017	Associate Forest Property Appraiser (Board of Equalization)
KU30	5016	Senior Forest Property Appraiser (Board of Equalization)

DEFINITION OF SERIES

The Forest Property Appraiser appraises and investigates forest and forest industry properties to derive harvest value data for the timber yield tax system; performs post-harvest evaluations to ensure full compliance with the State Timber Yield Tax Law; collects and analyzes value and harvest data to determine market conditions and to establish value schedules.

TYPICAL TASKS

Performs appraisals and investigations of all forest and forest industry properties in an assigned geographical area in California; determines classification of timber by making sample cruises and reviewing timber harvesting plans and harvest operations; conducts economic studies of forest industry which includes researching, collecting, and analyzing data to determine price trends and market values; inspects public and private harvest operations to determine degree of compliance in reporting Timber Yield Tax; tests new field and valuation procedures and techniques to improve the administration of the timber tax; makes and verifies computations; prepares reports on forest and forest industry properties; develops forms, methods, and procedures for the appraisal of forest industry properties.

DEFINITION OF LEVELS

ASSISTANT FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

This is the entry level. Under direct supervision, incumbents learn

and conduct the less difficult forest appraisals and field investigations of small single owner timber harvest operations; collect and analyze data for the appraisal of forest properties; assist in the more complex forest appraisals; and do other related work.

ASSOCIATE FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

This is the journey level. Under general direction, incumbents independently conduct the more to most difficult and complex forest and forest industry property appraisals, including forest harvest operations covering timber lands up to 25,000 acres, with multiple location harvest operations, mixed logging systems, various timber age classifications and species compositions, timber quality codes, and skewed bidding; may act in a lead capacity; and do other related work.

SENIOR FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

This is the full supervisory level. Under general direction, incumbents have supervisory responsibility to direct and manage the activities of a field office with a staff of two to five professional staff performing economic studies, timber valuation, audit, and compliance activities in a specified geographical area; reviews appraisals for conformance with the Board of Equalization's Timber Yield Tax laws and regulations; meets with forest property owners and Board of Equalization's appraisal and audit staff involving disputed assessments and successfully recommends value determinations; conducts the post-harvest appraisals when discrepancies occur between the Board of Equalization's appraiser and forest property owner; participates as an advisor to the Statewide Timber Advisory Committee; and does other related work.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Education: Equivalent to graduation from college or university with a major in forestry. (Additional experience in technical forestry work or timber appraisal work may be substituted for the required education on a year-for-year basis.)

ASSISTANT FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Experience: Either

1. Two years of experience in real property appraisal work including at least one year in work regularly involving the appraisal of forest and forest industry property. or

2. Three years of experience in work regularly involving forestry knowledge and application, timber cruising, and appraisals of forest and forest industry property.

ASSOCIATE FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in the California state service performing the duties of an Assistant Forest Property Appraiser.

Or II

1. Three years of experience in real property appraisal work, including at least two years in work regularly involving the appraisal of forest and forest industry property. or

2. Four years of experience in work regularly involving forestry knowledge and application and appraising of forest and forest industry property.

SENIOR FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in the California state service performing the duties of an Associate Forest Property Appraiser.

Or II

1. Four years of experience in real property appraisal work in a local assessor's office, including or supplemented by at least two years of experience in work regularly involving the independent appraisal of large and complex forest and forest industry property. or

2. Four years of experience in the independent appraisal of large and complex forest and forest industry property.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: General appraisal methods, procedures, and terminology involved in valuation of forest properties; forest management principles and practices; forest harvesting methods; timber and forest property values and the effect of economic trends on values and price; real property appraisal methods, procedures, and terminology.

Ability to: Apply the required knowledge, assemble, and analyze information on timber and land values; survey, cruise, and appraise timber; interpret maps and property records and locate properties for appraisal; analyze data and draw sound conclusions, analyze situations accurately and take effective action; prepare clear, complete, and concise reports; communicate effectively.

ASSOCIATE FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Knowledge of: All of the above; provisions of timber yield tax laws and regulations administered by the State Board of Equalization; forest, range, and watershed management principles and practices; training principles and practices; organization of the State Board of Equalization, particularly the Property Taxes Program.

Ability to: All of the above.

SENIOR FOREST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Knowledge of: All of the above; methods, practices, and procedures followed in forest tax assessment work; principles, methods, and techniques of training and personnel management; principles of supervision; State Constitution and Revenue and Taxation Code pertaining to assessment of property for tax assessment and timber yield tax purposes; Board's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above; plan, organize, and direct the work of a staff engaged in forest appraisal and compliance activities; assemble and analyze appraisal data and apply it to a property tax equalization program; analyze existing appraisal and assessment systems and make recommendations for and assist in the installation of improvements; establish and maintain cooperative relations with local government, the private sector, and others; give presentations to governmental boards and other groups; develop the skills and abilities of subordinate staff; resolve supervisorial problems; and effectively contribute to the Board's affirmative action objectives.

LICENSE REQUIREMENT

ASSOCIATE FOREST PROPERTY APPRAISER
SENIOR FOREST PROPERTY APPRAISER

Possession of a valid license as a Professional Forester issued by the California State Board of Forestry.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Assistant Forest Property Appraiser (Board of Equalization)	1/22/59	4/21/92	4/21/92
Associate Forest Property Appraiser (Board of Equalization)	2/26/54	4/21/92	4/21/92
Senior Forest Property Appraiser (Board of Equalization)	2/26/54	4/21/92	4/21/92

SPEC: GRADUATE STUDENT ASSISTANT
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	MF40
Class Code:	4872
Established:	5/3/72
Revised:	--
Title Changed:	--

GRADUATE STUDENT ASSISTANT

DEFINITION

Under close supervision and in a trainee capacity, to assist in the performance of professional duties such as research and other functions related to the departmental assignment; and to do other related work.

JOB CHARACTERISTICS

The class of Graduate Student Assistant is a training class established to provide limited term employment offering supervised experience in various professional areas. Employment in this class is restricted to students in a college or university curriculum leading to an advanced degree in a professional area. This class is designed to provide graduate students with an opportunity to familiarize themselves with the State's professional work. It enables State agencies to utilize the services of graduate students during the course of their graduate training and facilitates more effective recruitment of applicants for professional careers in State service.

TYPICAL TASKS

Receives training from the departmental staff and gains practical experience by observing and assisting with the work performed; assists in and performs research; analyzes and evaluates data; prepares recommendations, reports and correspondence; observes methods, problems and principles related to the departmental assignments; gains experience in the methods and ethics of professional conduct and practice.

MINIMUM QUALIFICATIONS

Registration as a graduate student in a college or university of recognized standing. (Persons appointed during the summer months must produce evidence of eligibility for such registration in the following enrollment period.)

KNOWLEDGE AND ABILITIES

Knowledge of: General concepts and principles involved in the departmental assignment.

Ability to: Reason logically; establish and maintain effective working relationships; draw sound conclusions and make appropriate recommendations.

SPECIAL PERSONAL CHARACTERISTICS
Interest and aptitude in the work; willingness to do routine work in order to learn; high ethics and moral standards.

SPEC: GRAPHIC DESIGNER SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

GRAPHIC DESIGNER
Series Specification
(Established January 19, 2000)

Schem Code	Class Code	Class
GC75	2884	Graphic Designer I
GC70	2885	Graphic Designer II
GC65	2886	Graphic Designer III

DEFINITION OF SERIES

A consolidated series specification that describes three levels of graphic designers that are responsible for the consultation, research, concept development, and execution in the production of a visual communication product.

DEFINITION OF LEVELS*

GRAPHIC DESIGNER I

This is the entry/first working level in the Graphic Designer series. Under direction, the Graphic Designer I is responsible for the development and production of complex graphic design work or assists the Graphic Designer II or III in the development and completion of design production. The Graphic Designer I uses traditional and/or computer-assisted applications for layout, illustration, and image editing.

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* Additional information regarding functions performed, complexity factors, and scope of responsibility is contained in a separate document titled "Allocation Guidelines."

GRAPHIC DESIGNER II

This is the full journey level in the Graphic Designer series. Under direction, the Graphic Designer II is responsible for the concept, development, and production of the more complex graphic design work. With the aid of computer-assisted applications the graphic designer uses design and production elements to convey the desired impact and message to a specifically targeted audience.

GRAPHIC DESIGNER III

This is the advanced journey level in the Graphic Designer series. Incumbents create and produce materials and/or publications at the highest level for print, on-line publishing, multimedia, and other mediums. Incumbents in this class serve as high-level specialists responsible for the development and production of the most complex graphic design work.

MINIMUM QUALIFICATIONS

GRAPHIC DESIGNER I

Experience: One year of experience in page layout, drawing, photo editing, type formatting, and electronic file preparation using both traditional and/or computer-assisted software. and

Education: Successful completion of a total of 12 semester college units with a minimum of two units in each of the following areas: graphic design theory, graphic computer software applications, and printing technology.

GRAPHIC DESIGNER II

Either I

Experience: One year of experience in the California state service as a Graphic Designer I.

Or II

Experience: Two years of experience in concept development, consulting, page layout, drawing, photo editing, color correction, file preparation, on-line publishing, multimedia, and other mediums. and

Education: Successful completion of a total of 24 semester college units with a minimum of five units in each of the following areas: graphic design theory, graphic computer software applications, and printing technology.

GRAPHIC DESIGNER III

Either I

Experience: One year of experience in the California state service as a Graphic Designer II.

Or II

Experience: Three years of experience in concept development, consulting, page layout, drawing, photo editing, color correction, file preparation, on-line publishing, multimedia, and other mediums. and

Education: Successful completion of a total of 30 semester college units with a minimum of six units in the following areas: graphic design theory, graphic computer software, and printing technology. (One year of additional experience can be substituted for one year of college.)

KNOWLEDGE AND ABILITIES

GRAPHIC DESIGNER I

Knowledge of: Principles of graphic design; techniques of interpreting statistical data; methods and techniques of freehand drawing and color illustration; elements of design such as: line, shape, texture, space, size, value, and color; principles of design such as: balance/symmetry, rhythm/repetition, emphasis, unity, movement, and proportion/scale; page layout, color theory, and typography; principles of graphic tools and equipment; graphic design software application; procedures for creating traditional and/or electronic files for output for single and multicolor publication.

Ability to: Communicate effectively; use the elements of design to create page layout; perform image editing; apply color theory and typography; apply creativity in the preparation of art work; learn and apply new software; produce freehand drawing and color illustration; maintain project files.

GRAPHIC DESIGNER II

Knowledge of: All of the above, and the stages of design (research, thumbnail, rough, comprehensives, and camera-ready art) to an electronic file; techniques and drawings; graphic resources and software applications; digital imaging; principles and techniques of three-dimensional exhibit preparation.

Ability to: All of the above, and design and prepare exhibit materials; digitally retouch images; review narrative material and create appropriate illustrations; analyze situations accurately and take effective action; research resources.

GRAPHIC DESIGNER III

Knowledge of: All of the above, and project leadership; time management; state-of-the-art graphic design techniques, theories, and processes; departmental programs and objectives; alternate strategies available to establish and improve comprehensive graphic design programs; team-building techniques and principles; principles of effective proposal writing.

Ability to: All of the above, and establish and maintain effective working relationships; negotiate; present ideas to a large or diverse audience; troubleshoot within the graphics application software; prepare project reports; use time effectively; assimilate ideas and concerns from a variety of customers and translate them into an effective and cost-efficient graphic design project or program.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Visual acuity and color vision sufficient to successfully perform the job; and creative ability.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

A certification or degree from an accredited or recognized professional institute or body in the program areas of art, design, visual communications, and computer graphics; and neatness.

CLASS HISTORY

	Date Established	Date Revised	Title Changed
Graphic Designer I	1/19/00	--	--
Graphic Designer II	1/19/00	--	--
Graphic Designer III	1/19/00	--	--

SPEC: HEARING REPORTER

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code: CD20
Class Code: 1229
Established: 1931
Revised:

3/30/78

Title Changed:

7/23/81

HEARING REPORTER

DEFINITION

Under direction, to record in shorthand or machine shorthand writing and transcribe verbatim accounts of proceedings, hearings, and other meetings; and to do other related work.

TYPICAL TASKS

Takes verbatim accounts of conferences, hearings, proceedings, trials, and other formal or informal meetings in shorthand or machine shorthand writing; properly identifies speakers and notes the introduction of exhibits and other matters; takes depositions and the testimony of witnesses on a variety of subject matter within a number of fields of work; transcribes notes on a typewriter or redictates on dictating equipment for transcription by a transcriber; frequently working to meet fixed deadlines, prepares a complete transcript of evidence and testimony; frequently travels to various locations to record proceedings and hearings; appears before quasijudicial bodies or other formal groups to read shorthand notes; takes and transcribes dictated summaries of minutes of meetings, and performs incidental related clerical and stenographic work.

MINIMUM QUALIFICATIONS

Experience: Either

1. One year of experience taking and transcribing verbatim accounts of conferences, hearings, proceedings, trials, and other formal meetings in shorthand or machine shorthand writing; or

2. Possession of a State of California License as a Certified Shorthand Reporter; or

3. Possession of a Certificate of Proficiency or a Certificate of Merit issued by the National Shorthand Reporters' Association (NSRA). (Completion of eighteen months of full-time study at a school specializing in Hearing Reporter training may be substituted for not more than half of the required experience under Pattern I.)

KNOWLEDGE AND ABILITIES

A wide knowledge of: Grammar and spelling and possession of vocabulary; legal, medical, and other technical terminology; customary hearing procedures.
Ability to: Read and write English at a level required for successful job performance; take dictation at the rate of 200 words per minute in shorthand or machine shorthand writing; record hearings verbatim continuously for several hours, and transcribe notes with skill, speed, and accuracy after an interval of time; type at a rate of not less than fifty net words a minute; dictate accurately and clearly from notes; adapt to changing situations and maintain a calm and even disposition under trying circumstances; follow oral and written directions.

SPECIAL PERSONAL CHARACTERISTICS

Willingness to travel throughout the State, poise, and normal hearing.

ADDITIONAL DESIRABLE QUALIFICATION

Education equivalent to completion of the twelfth grade.

SPEC: INFORMATION OFFICER I (SPECIALIST)
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LZ17
Class Code:	5601
Established:	11/18/55
Revised:	5/21/85
Title Changed:	5/21/85

INFORMATION OFFICER I (SPECIALIST)

DEFINITION

Under direction, to perform the more difficult professional and technical tasks associated with the conduct of a comprehensive program to inform the public of the activities and objectives of a State agency; and to do other related work.

DISTINGUISHING CHARACTERISTICS

An Information Officer I is differentiated from an Information Officer II by the agency's program and by the level of responsibility delegated.

In an agency with a complex and extensive information program directed by an Information Officer II, an Information Officer I (Specialist) may be responsible for a wide range of general assignments (as designated below under Typical Tasks), or for a major segment of the total information program, or for an assigned geographical area. In an agency not utilizing an Information Officer II, an Information Officer I (Specialist) may have full responsibility for the conduct of the information program.

TYPICAL TASKS

Plans, writes, edits, and otherwise prepares more complicated information material for dissemination through all major means of communication; disseminates such information material through appropriate channels; prepares replies to difficult and complicated correspondence, including letters for signature by superiors; plans exhibits; provides writing, editing and advisory service to other agency officials; acts as spokesperson for the agency before public groups, to the news media, and to individuals who inquire regarding the agency's activities; arranges participation of other agency officials as speakers before public groups, or on radio and television newscasts or other programs; collects, evaluates and distributes information from outside sources to the agencys' staff.

MINIMUM QUALIFICATIONS

Either I

One year of experience in the California state service performing duties equivalent to those of an Assistant Information Officer.

Or II

Experience: Four years of successful experience in writing, reporting or editing for a newspaper, new service, radio or television station, or magazine, or in a position having major duties in the area of public relations or public information and involving communicating to the public. The experience must have developed the ability to be responsible for the conduct of a comprehensive public information program for a State agency. Writing experience, while an integral part of the above requirements, will not be considered qualifying in itself. and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: Techniques of preparing, producing and disseminating information, utilizing all major media of communication; principles and techniques of establishing and maintaining good relations with news media and other public groups; California State Government and principles of public administration.

Ability to: Write, edit, and prepare for publication or reproduction news releases, magazine articles, correspondence, booklets, brochures, pamphlets, magazines, reports, speeches, scripts for radio, television or motion pictures, and other information material; speak effectively; analyze data; assume responsibility for the administration of a public information program.

SPECIAL PERSONAL CHARACTERISTICS

Appreciation of news values; ability to analyze situations accurately and adopt effective courses of action; demonstrated capacity for assuming progressively greater responsibility; emotional stability under stress; appreciation of the need to inform and educate the public on various phases of an agency's program; ability to establish and maintain cooperative working relations with the news media and other public groups; ability to gain and hold the confidence and respect of those contacted in the work.

ADDITIONAL DESIRABLE QUALIFICATIONS

Training or experience developing skills in management or public administration, including budgeting skills.

SPEC: INFORMATION OFFICER II

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LZ10
Class Code:	5595
Established:	11/18/55
Revised:	2/4/81
Title Changed:	--

INFORMATION OFFICER II

DEFINITION

Under administrative direction, to develop, organize, direct, and evaluate a comprehensive program to inform the public of the activities and objectives of a State agency; to consult with and advise top management of the agency on public relations implications of the agency's activities; and to do other related work.

DISTINGUISHING CHARACTERISTICS

An Information Officer II is differentiated from an Information Officer I by the agency's program and by the level of responsibility delegated.

An Information Officer II is delegated full responsibility for all aspects of information activities in an agency that meets one or more of these criteria; its program either directly affects a large and heterogeneous public, or it affects a public with strong personal interests in its administration; it usually has economic, political, or social implications of considerable impact; it often elicits continuous interest and critical review by political bodies or interest groups; administration of its program is often subject to question, misconceptions, and conflicting views.

An Information Officer II reports directly to top management who rely upon the incumbent for advice on good public relations consistent with overall goals; develops special channels for earning public or specific group support; may appear as agency spokesperson before large groups; frequently supervises professional, technical and clerical subordinates.

TYPICAL TASKS

Analyzes the extent of public understanding of the programs administered by the agency and determines the need for further public information and education activity; establishes the objectives of the agency's information program and develops and actuates the techniques and procedures to accomplish these objectives; directs a staff in the conduct of the program; evaluates its effectiveness and recommends appropriate changes; coordinates and evaluates the information and education activities of the

agency's field personnel; meets with top management and advises on any public relations implication of proposed actions; attends staff conferences at top management level as a regular participating member; contacts individuals and members of interested organizations to keep them informed of the agency's activities; makes speeches before various groups; promotes the knowledge and use of the agency's services; performs to the extent required any or all of the typical tasks of an Information Officer I.

MINIMUM QUALIFICATIONS

Either I

Two years of experience in the California state service performing duties equivalent to those of an Information Officer I.

Or II

Experience: Broad and successful experience which has demonstrated the ability to plan and direct a comprehensive public information program. This must have included at least five years' professional experience in preparing and disseminating information, a substantial part of which also included supervising the writing of others. Writing experience, while an integral part of the above, will not be considered qualifying in itself. and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: Methods used to determine needs for public information and education; techniques of preparing, producing and disseminating information, utilizing all major media of communication; principles and techniques of establishing and maintaining good public relations; California State Government; principles of public administration; effective supervision; department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Organize and direct a statewide program of public information and education; write effectively; analyze data; supervise the work of an information staff; stimulate interest in an agency's program and secure the cooperation of diverse groups in conducting that program; understand and effectively carry out State and departmental equal employment opportunity and affirmative action policies.

SPECIAL PERSONAL CHARACTERISTICS

Appreciation of news value; ability to analyze situations accurately and adopt or recommend for adoption by top management an effective course of action; ability to gain the confidence and respect of persons contacted in the work; ability to establish and maintain cooperative working relations with the news media and other public groups; emotional stability under stress; application of the need to inform and educate the public on various phases of an agency's program.

SPEC: INFORMATION SYSTEMS ANALYST SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

INFORMATION SYSTEMS ANALYST
Series Specification
(Established July 24, 1975)

SCOPE

Classes in this series are used to perform a variety of analytical activities in support of information technology systems, such as microcomputers, multifunction automated office systems, and teleprocessing networks and/or systems. Incumbents develop problem solutions using information technology methods; conduct feasibility studies; act as project managers over information technology system projects; work on analysis and support of multifunction office systems; provide information center services and information technology system services; develop information processing standards and procedures; act as leadperson or supervisor over the technical personnel in the performance of information system tasks; and do other related work.

This class series is differentiated from the Programmer Analyst series in that incumbents typically do not perform programming tasks and are not typically involved in the development of detailed program specifications.

Entry into this series is typically through the Programmer, Information Systems Technician, or Computer Operator classification series, or through open hiring into the Information Systems Analyst class series.

Factors affecting position allocation include variety and complexity of work assignments; scope and consequence of decisions made; independence of action and decision; leadership or supervision exercised and direction received; and the size and complexity of the information technology system.

Schem Code	Class Code	Class
LM96	1479	Assistant Information Systems Analyst
LM92	1470	Associate Information Systems Analyst (Specialist)
LM90	1471	Associate Information Systems Analyst (Supervisor)
LM86	1312	Staff Information Systems Analyst (Specialist)
LM84	1316	Staff Information Systems Analyst (Supervisor)
LM82	1337	Senior Information Systems Analyst (Specialist)
LM80	1340	Senior Information Systems Analyst (Supervisor)

DEFINITION OF LEVELS

ASSISTANT INFORMATION SYSTEMS ANALYST

This is the entry and first journey level. Positions may be permanently allocated to this class when the major portion of tasks performed do not include the more responsible, varied, and difficult analytical assignments found in the full journeyperson level. Under

supervision, incumbents perform work of average difficulty in analytical studies for the support, development, installation, implementation, or procurement of information technology systems, and teleprocessing networks and/or systems.

ASSOCIATE INFORMATION SYSTEMS ANALYST (SPECIALIST)

This is the full journey level. Under general supervision, incumbents perform a variety of tasks in connection with the analysis, development, installation, implementation, procurement, or support of information technology systems, multifunction automated office systems, microcomputer systems, and teleprocessing networks and/or systems; and/or act as project leader on information technology system studies, and/or participate with other analysts on information technology systems studies of complex nature or broad scope.

ASSOCIATE INFORMATION SYSTEMS ANALYST (SUPERVISOR)

Under general supervision, acts as supervisor on projects or information technology systems of standard complexity.

STAFF INFORMATION SYSTEMS ANALYST (SPECIALIST)

Under general supervision, acts as a project leader on complex information technology studies or systems, works on complex information technology systems problems, and serves as the advanced technical specialist performing complex analytical studies and activities on complex information technology systems, projects, and/or teleprocessing networks/systems.

STAFF INFORMATION SYSTEMS ANALYST (SUPERVISOR)

This is the working supervisor level. Under general supervision, supervises a small staff of analysts performing a wide variety of analytical activities in support of complex information technology systems and/or teleprocessing networks/systems.

SENIOR INFORMATION SYSTEMS ANALYST (SPECIALIST)

Under general direction, acts as project leader on the most complex information technology systems, works on the most complex information technology system problems, and independently performs the most complex studies and activities on the most complex information technology systems and/or teleprocessing networks/systems.

SENIOR INFORMATION SYSTEMS ANALYST (SUPERVISOR)

This is the full supervisory level. Under general direction, supervises a medium size staff of analysts performing a wide variety of analytical activities in support of the most complex information technology systems and/or teleprocessing networks/systems.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to other patterns to meet the total experience requirement.

ASSISTANT INFORMATION SYSTEMS ANALYST

Either I

One year of experience in the California state service performing duties comparable to an Information Systems Technician (Range C), a Computer Operator (Range C), or a Programmer I (Range B).

Or II

One year of progressively responsible analytical experience in performing a variety of information technology systems analysis, design, development, installation, implementation, procurement, or technical support duties in connection with information technology systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks, including independent analysis in one or more of these areas.

Or III

Completion of at least 60 semester or 90 quarter units at a recognized college or university, of which 12 semester or 18 quarter units are comprised of information technology-related coursework.

ASSOCIATE INFORMATION SYSTEMS ANALYST (SPECIALIST)
ASSOCIATE INFORMATION SYSTEMS ANALYST (SUPERVISOR)

Either I

One year of experience in the California state service performing duties comparable to an Assistant Information Systems Analyst (Range C); Programmer II; Information Systems Technician Specialist II; Information Systems Technician Supervisor II; Computer Operations Specialist II; or Computer Operations Supervisor II.

Or II

Eighteen months of progressively responsible analytical experience in performing a variety of information systems analysis, design, development, installation, implementation, procurement, or technical support duties in connection with information technology systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks. At least one year of this experience must include completion of analytical studies for the support, development, installation, implementation, or procurement of information technology systems.

Or III

Equivalent to graduation from a recognized college or university with a minimum of 24 semester or 36 quarter units in information technology-related coursework. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

STAFF INFORMATION SYSTEMS ANALYST (SPECIALIST)
STAFF INFORMATION SYSTEMS ANALYST (SUPERVISOR)

Either I

One year of experience in the California state service performing duties comparable to an Associate Information Systems Analyst (Specialist) or an Associate Information Systems Analyst (Supervisor).

Or II

Two years of progressively responsible analytical experience performing a variety of information technology systems analysis,

design, development, installation, implementation, procurement, or technical support duties in connection with information technology systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks or analysis of operational methods and designing information technology systems to meet desired results. At least one year of this experience must include leadership on an information technology project, or participation with other analysts on information technology systems studies of complex nature or broad scope.

Or III

Thirty semester units or 45 quarter units of graduate work in information technology-related coursework from a recognized college or university.

SENIOR INFORMATION SYSTEMS ANALYST (SPECIALIST)
SENIOR INFORMATION SYSTEMS ANALYST (SUPERVISOR)

Either I

One year of experience in the California state service performing duties comparable to a Staff Information Systems Analyst (Specialist) or Staff Information Systems Analyst (Supervisor).

Or II

Two years of experience in the California state service performing duties comparable to an Associate Information Systems Analyst (Specialist) or Associate Information Systems Analyst (Supervisor).

Or III

Thirty months of progressively responsible analytical experience performing a variety of information technology systems analysis, design, development, installation, implementation, procurement, or technical support duties in connection with information technology systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks, which shall have included responsibility for analyzing operational methods and designing information technology systems to meet desired results. At least one year of this experience must include leadership on complex information technology studies or systems, responsibility for resolution of complex information technology problems, or as an advanced technical specialist performing complex analytical studies.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Principles of public administration, organization, and management; information technology systems equipment, software, and practices; analytical techniques; technical report writing.

Ability to: Analyze information and situations, identify and solve problems, reason logically, and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing information with information technology systems; monitor and resolve problems with information technology systems hardware, software, and processes; establish and maintain effective working relationships with others; communicate effectively.

ASSOCIATE INFORMATION SYSTEMS ANALYST (SUPERVISOR)
STAFF INFORMATION SYSTEMS ANALYST (SUPERVISOR)
SENIOR INFORMATION SYSTEMS ANALYST (SUPERVISOR)

Knowledge of: All of the above, and principles of personnel management, supervision, and training; the department's Equal

Employment Opportunity objectives; a manager's role in the Equal Employment Opportunity and the processes available to meet equal employment objectives.

Ability to: All of the above, and supervise technical personnel; effectively contribute to the department's equal employment objectives.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Assistant Information Systems Analyst	6/12/89	5/2/01	--
Associate Information Systems Analyst (Specialist)	9/1/75	5/2/01	6/12/89
Associate Information Systems Analyst (Supervisor)	12/4/84	5/2/01	6/12/89
Staff Information Systems Analyst (Specialist)	9/1/75	5/2/01	6/12/89
Staff Information Systems Analyst (Supervisor)	12/4/84	5/2/01	6/12/89
Senior Information Systems Analyst (Specialist)	9/1/75	5/2/01	6/12/89
Senior Information Systems Analyst (Supervisor)	12/4/84	5/2/01	6/12/89

SPEC: INFORMATION SYSTEMS TECHNICIAN SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

INFORMATION SYSTEMS TECHNICIAN
Series Specification
(Established June 28, 1972)

SCOPE

The classes in this series are used to perform a variety of technical duties in support of the operation of information technology systems, such as microcomputers, multifunction automated office systems, and teleprocessing networks or systems; and to supervise others in the performance of information processing activities and related technical tasks. The factors that affect position allocation include the variety and complexity of work assignments, scope and consequence of decisions made and supervision exercised or received, and size and complexity of the information technology system.

Entry into this series is typically from outside State service or from other State classes performing duties in support of information technology systems.

Schem Code	Class Code	Class
LN48	1360	Information Systems Technician
LN45	1562	Information Systems Technician Specialist I
LN44	1408	Information Systems Technician Supervisor I
LN43	1557	Information Systems Technician Specialist II
LN42	1407	Information Systems Technician Supervisor II

DEFINITION OF LEVELS*

INFORMATION SYSTEMS TECHNICIAN

This deep class includes ranges comprising the entry, trainee, journeyperson, and working leadperson levels in this series. Incumbents in lower ranges of the class work under close supervision learning and performing a variety of the less complex technological duties supporting information technology systems, such as, but not limited to, data management; procedure writing; writing job setup instructions; performing program librarian functions; doing other related duties in support of the systems analysis, programming, and machine operations effort of an information technology system; conducting on-the-job training for system users, facilitating system utilization, communicating on a regular basis with system users, operating all components of the information technology system and peripheral equipment (except mainframe consoles), and requesting service on equipment as needed. As training progresses, incumbents of the class work under general supervision performing a variety of duties supporting information technology systems, such as, but not limited to, assisting with the conduct of classroom instruction for system users and preparing lesson guides and evaluating the users' progress; providing user support in methods of system use in producing work more effectively and efficiently; developing and maintaining data guidance procedures; setting up job streams and utility programs; preparing and coordinating processing schedules and changes; coordinating teleprocessing networks and/or systems; installing new software and software upgrades on stand alone

microcomputers; acting as technical consultant and troubleshooter on stand alone information systems; and performing other related duties supporting information systems.

INFORMATION SYSTEMS TECHNICIAN SPECIALIST I

This is the working lead and first technical specialist level. Under general supervision, incumbents perform information technology system support duties, such as, but not limited to, developing operation instructions and procedures for projects run on multifunction information technology systems; developing and coordinating job stream tests for large/complex systems; checking production frequently and modifying schedules to improve system performance; coordinating multiple on-line telecommunications systems and/or networks; performing tasks in support of systems staff in system testing; maintaining operating records such as production and system performance reports; conducting training for users in automated office system uses; conducting classroom training in advanced application uses of the system; serving as the primary contact point for information systems analysts, programmers, and system users in the design, development testing, and ongoing production operation of multifunction information technology systems; installing new software and software upgrades through multifunction information technology systems; developing basic reports using fourth generation languages; and acting as technical consultant and troubleshooter on multifunction information technology systems.

INFORMATION SYSTEMS TECHNICIAN SUPERVISOR I

Under direction, incumbents supervise the activities of a small group of Information Systems Technicians.

INFORMATION SYSTEMS TECHNICIAN SPECIALIST II

This is the highest technical specialist level. Under general direction, incumbents work independently or as team leaders, and perform duties including, but not limited to, scheduling processing in a multiple system environment using appropriate scheduling software; coordinating processing of the largest most complex systems or having lead responsibility for complex teleprocessing across multiple organizations; investigating and resolving system performance problems; coordinating equipment modification and installation tasks; developing, testing, and implementing new and revised fourth generation programs; and acting as technical consultant and troubleshooter on the most complex systems.

INFORMATION SYSTEMS TECHNICIAN SUPERVISOR II

Under general direction, incumbents plan, organize, and direct the activities of a medium to large group of Information Systems Technicians and/or Specialists, and/or perform equivalent supervisory duties.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Unless otherwise stated, experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other to meet the total experience

requirement.

INFORMATION SYSTEMS TECHNICIAN

Either I

Two years of work experience performing duties comparable to those of an Office Assistant (Range B) in the California state service and at least three semester units or four quarter units from a recognized college or university in information technology-related coursework.

Or II

One year of experience performing a variety of technical duties in support of an information technology system [includes learning and performing a variety of the technological duties supporting information technology systems, such as data management; procedure writing; writing job setup instructions; performing program librarian functions; doing other related duties in support of the systems analysis programming and machine operations effort of an information technology system; conducting on-the-job training for system users, facilitating system utilization, communicating on a regular basis with system users, operating all components of the information technology system and peripheral equipment (except mainframe consoles), and requesting service on equipment as needed].

Or III

Twelve semester units or eighteen quarter units from a recognized college or university in information technology-related coursework or equivalent academic training provided from an accredited institution recognized by the Accrediting Council for Independent Colleges and Schools (ACICS) or the Accrediting Commission of Career Schools and Colleges of Technology (ACCSCT). The ACICS or ACCSCT must cite the institution as being accredited for the relevant program being considered for qualification. (Partial completion of the requirement may not be combined with the other patterns to meet minimum qualifications.)

INFORMATION SYSTEMS TECHNICIAN SPECIALIST I
INFORMATION SYSTEMS TECHNICIAN SUPERVISOR I

Either I

One year of experience in the California state service performing duties comparable to those of an Information Systems Technician (Range C).

Or II

Eighteen months of experience performing the full range of technical duties in support of an information technology system. (Includes a variety of duties supporting information technology systems, such as assisting with the conduct of classroom instruction for system users and preparing lesson guides and evaluating the users' progress; providing user support in methods of system use in producing work more effectively and efficiently; developing and maintaining data guidance procedures; setting up job streams and utility programs; preparing and coordinating processing schedules and changes; coordinating teleprocessing networks and/or systems; installing new software and software upgrades on stand alone microcomputers; acting as technical consultant and troubleshooter on stand alone information systems.) One year of experience must include independent performance of these duties.

Or III

1. Completion of at least 60 semester units or 90 quarter units at a recognized college or university, of which 12 semester or 18 quarter units are comprised of information technology related coursework. or

2. Equivalent academic training provided from an accredited

institution recognized by the Accrediting Commission of Career Schools and Colleges of Technology (ACCSCT), or the Accrediting Council for Independent Colleges and Schools (ACICS). The ACICS or ACCSCT must cite the institution as being accredited for the relevant program being considered for qualification. (Partial completion of the requirement may not be combined with the other patterns to meet minimum qualifications.)

INFORMATION SYSTEMS TECHNICIAN SPECIALIST II
INFORMATION SYSTEMS TECHNICIAN SUPERVISOR II

Either I

One year of experience in the California state service performing duties comparable to those of an Information Systems Technician Specialist I or an Information Systems Technician Supervisor I.

Or II

Two years of experience performing the full range of technical duties in support of an information technology system. (This includes a variety of information technology system support duties, such as developing operation instructions and procedures for projects run on multifunction information technology systems; developing and coordinating job stream tests for large/complex systems; checking production frequently and modifying schedules to improve system performance; coordinating multiple on-line telecommunications systems and/or networks; performing tasks in support of systems staff in system testing; maintaining operating records such as production and system performance reports; conducting training for users in automated office system uses; conducting classroom training in advanced application uses of the system; serving as the primary contact point for information systems analysts, programmers, and system users in the design, development testing, and ongoing production operation of multifunction information technology systems; installing new software and software upgrades through multifunction information technology systems; developing basic reports using fourth generation languages; and acting as technical consultant and troubleshooter on multifunction information technology systems.) One year of this experience must include working as a lead or independent technical specialist.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Information technology systems and their use including, but not limited to, procedures, controls, and documentation.

Ability to: Analyze and take effective action; perform arithmetical computations; communicate effectively; work cooperatively with others and gain their respect and confidence; follow instructions.

INFORMATION SYSTEMS TECHNICIAN SPECIALIST I
INFORMATION SYSTEMS TECHNICIAN SPECIALIST II

Knowledge of: In addition to the above, information technology systems hardware and software; techniques of system operation; installing and maintaining multifunction information processing systems.

Ability to: In addition to the above, coordinate and work with other personnel.

INFORMATION SYSTEMS TECHNICIAN SUPERVISOR I
INFORMATION SYSTEMS TECHNICIAN SUPERVISOR II

Knowledge of: In addition to the above, the principles of effective supervision and training; the department's Equal Employment Opportunity objectives; a manager's role in the Equal Employment Opportunity and the processes available to meet equal employment objectives.

Ability to: In addition to the above, supervise the work of technical and clerical assistants; effectively contribute to the department's equal employment objectives.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Willingness to work unusual shifts including evenings, nights, and weekends.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Information Systems Technician	6/28/72	5/2/01	6/12/89
Information Systems Technician Specialist I	3/20/84	5/2/01	6/12/89
Information Systems Technician Supervisor I	10/7/60	5/2/01	6/12/89
Information Systems Technician Specialist II	3/20/84	5/2/01	6/12/89
Information Systems Technician Supervisor II	10/7/60	5/2/01	6/12/89

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* Additional information regarding functions performed, complexity factors, and scope of responsibility is contained in a separate document titled "Allocation Guidelines."

SPEC: KEY DATA OPERATIONS
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

KEY DATA OPERATIONS
Series Specification
(Established December 15, 1971)

SCOPE

This series specification describes the Key Data Operator and Key Data Supervisor classes. Incumbents either (1) are learning to operate key punch or key entry machines, (2) operate key punch or key entry machines, (3) operate consoles, (4) code, compile, debug, analyze and define formats for key entry systems and machines, (5) supervise the work of a group of employees operating key punch or key entry equipment, or (6) supervise technical support units.

Schem Code	Class Code	Class
CJ50	1419	Key Data Operator
CJ40	1420	Key Data Supervisor I
CJ30	1436	Key Data Supervisor II
CJ20	1435	Key Data Supervisor III
CJ10	1434	Key Data Supervisor IV

ENTRY LEVEL

Entry into this series is typically from outside State service.

FACTORS AFFECTING POSITION ALLOCATION

Level of difficulty, variety, and complexity of assigned duties, number of employees supervised, independence of action and consequence of error, and degree of supervision received serve as differentiating factors between individual classes.

DEFINITION OF LEVELS

KEY DATA OPERATOR

This is the entry, training and journeyperson level in this series. Incumbents, under close supervision, learn and perform routine key punch or key entry operations. Incumbents may have lead responsibility over others and secondary responsibility for the operation of a key-to-disc console.

KEY DATA SUPERVISOR I

This is the first supervisory or technical specialist level in the series. Under general supervision incumbents either (1) instruct and supervise the work of a small group of employees operating either key punch and/or key entry equipment, or (2) have primary responsibility

for the operation of a key-to-disc console, (3) have primary responsibility for developing and writing formats for key-to-disc/tape types of key entry systems.

KEY DATA SUPERVISOR II

This is the second supervisory level. Incumbents either (1) direct through one or more subordinate supervisors the work of small groups of employees operating either key punch and/or key entry equipment or (2) supervise small groups of employees operating key-to-disc consoles or developing and writing formats for key-to-disc/tape types of key entry systems.

KEY DATA SUPERVISOR III

This is the third supervisory level in the series. Incumbents direct through subordinate supervisors the work of large groups of employees operating either key punch and/or key entry equipment. Defines and proposes solutions for data entry problems related to budgeting, equipment acquisition, standards definition, and procedures development.

KEY DATA SUPERVISOR IV

This is the fourth supervisory level in the series. Incumbents direct through subordinate supervisors the work of large numbers of employees operating key punch and/or key entry equipment.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other to meet the total experience requirement. Experience in California state service applied toward "Pattern II" must include at least one year of qualifying experience performing the duties of a class with a level of responsibility comparable to that described in the promotional pattern.

KEY DATA OPERATOR

Familiarity with a standard alphabetic keyboard such as that on a typewriter, key punch or key entry machine.

KEY DATA SUPERVISOR I

Either I

One year of experience performing the duties of a Key Data Operator, Range B.

Or II

Two years of experience in the operation of either key punch or key entry machines.

KEY DATA SUPERVISOR II

Either I

One year of experience performing the duties of a Key Data Supervisor I.

Or II

Four years of experience in key punch or key entry work, at least one year of which must have been in a supervisory capacity.

KEY DATA SUPERVISOR III

Either I

One year of experience performing the duties of a Key Data Supervisor II or two years of experience performing the duties of a Key Data Supervisor I.

Or II

Five years of experience in key punch or key entry work, at least two year of which must have been in a supervisory capacity.

KEY DATA SUPERVISOR IV

Either I

One year of experience performing the duties of a Key Data Supervisor III, or two years of experience performing the duties of a Key Supervisor II.

Or II

Five years of experience in key punch or key entry work, at least three years of which must have been in a supervisory capacity. (Two years of the required supervisory experience must have been as a second level supervisor.)

KNOWLEDGE AND ABILITIES

KEY DATA OPERATOR

Knowledge of: Typewriter or key data keyboard.

Ability to: Demonstrate aptitude for key punch or key entry machine operation; perform general clerical work of average difficulty and follow directions.

KEY DATA SUPERVISOR I

Knowledge of: Uses, limitations and capacities of key entry machines, key punch machines, and associated equipment and their relationship to other data processing equipment; principles and techniques of formatting key to-disc/tape equipment and related procedures for key entry machines; principles of data processing machine operations; principles of effective supervision and training; modern office procedures; department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Plan, assign, supervise and coordinate the work of a staff of Key Punch and Key Entry Operators, and Clerical Assistants; do clerical work of average difficulty; perform arithmetical

computations accurately; analyze situations accurately and take effective action; follow oral and written instructions; effectively contribute to the department's affirmative action objectives.

KEY DATA SUPERVISOR II
KEY DATA SUPERVISOR III
KEY DATA SUPERVISOR IV

Knowledge of: Uses limitations, and capacities of key entry machines, key punch machines, and associated equipment and their relationship to other data processing equipment, principles and techniques of formatting key to-disc/tape equipment and related procedures for key entry machines; principles of data processing machine operations; principles of effective supervision and training; modern office procedures; the department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Plan organize, and direct the work of a group of key punch or key entry operators through subordinate supervisors; prepare reports, records and correspondence independently; establish and maintain effective production controls; devise key punch and key entry instructions for data processing programs; organize and conduct training programs; analyze data and draw valid conclusions; analyze situations accurately and take effective action; effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTICS

KEY DATA OPERATOR

Willingness to follow a prescribed routine; willingness to work under noisy conditions. Some positions may require the ability to lift and move trays of tabulating cards as required.

KEY DATA SUPERVISOR II
KEY DATA SUPERVISOR III
KEY DATA SUPERVISOR IV

A demonstrated interest in assuming increasing responsibility.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Key Data Operator	12/15/71	12/4/90	--
Key Data Supervisor I	12/15/71	4/9/81	--
Key Data Supervisor II	6/14/47	4/11/79	12/1/66
Key Data Supervisor III	6/3/65	4/11/79	12/1/66
Key Data Supervisor IV	6/3/85	4/11/79	12/1/66

CALIFORNIA STATE PERSONNEL BOARD
SPECIFICATION

LABOR RELATIONS
Series Specification
(Established March 14, 1979)

SCOPE

This series specification describes four classes performing specialized work in the field of public sector labor relations. Positions in this series are excluded under the Ralph C. Dills Act (formerly known as the State Employer-Employee Relations Act).

Schem Code	Class Code	Class
WR89	9529	Labor Relations Analyst
WR87	9535	Labor Relations Specialist
WR85	9537	Labor Relations Manager I
WR83	9539	Labor Relations Manager II

DEFINITION OF SERIES

Classes in this series are involved in representing State management under the Ralph C. Dills Act during all phases of the collective bargaining process by preparing for and participating in negotiations, impasse resolution, and contract administration activities. Work performed by incumbents in this series is typically confidential.

Labor Relations Series work is clearly distinguishable from general personnel management work. Positions performing general personnel management duties a majority of the time or labor relations work on a less than full-time basis during periods of collective bargaining are appropriately allocated to general personnel management classifications.

Positions at the Labor Relations Analyst and Specialist levels have responsibility for activities such as making recommendations to State management and advising management on making a determination regarding interpretation and application of provisions of labor agreements; ensuring State compliance with laws, policies, and labor agreements; investigating, recommending, and/or making decisions regarding disposition of grievances arising out of labor agreement administration, or grievances filed outside of the labor agreements; developing training programs for supervisory/management staff regarding State labor relations policies and proper practices in grievance handling or other areas of labor-management relations; researching and reporting on labor relations matters; participating in the development of State positions on matters within the scope of bargaining; providing assistance to task force studies on labor relations matters; and analyzing legislation, case law, and administrative regulations in the field of labor relations.

The Labor Relations Analyst class is a deep class with two alternate ranges. Range A is the entry through first working level for this labor relations class series. Focus is on learning and continued development through on-the-job experience. Assignments progress in difficulty and require the application of broad labor-management principles, practices, and trends. Incumbents support and facilitate the work of more experienced labor relations staff.

Positions allocated to the Analyst, Range B, class perform analytical support work at a level comparable to other Associate level analytical classes with an

increase in the scope and complexity of work. There is less direct review than at Range A and the incumbent is expected to demonstrate and perform with broader knowledge, skills, and responsibilities.

Positions allocated to the Specialist class are distinguished from Analyst positions by increased complexity, independence, authority, and responsibilities.

Positions at the Manager I and Manager II levels have supervisory and managerial responsibility for very complex labor relations programs, usually within large/very large departments. In this context, incumbents perform duties such as developing major statewide and department-wide strategies for dealing with employee concerns and alternative management bargaining positions; identifying policies to guide statewide labor relations activities; preparing and recommending statewide policy statements or revisions; and providing staff expertise for specific projects and statewide task force studies on labor relations matters.

DEFINITION OF LEVELS

LABOR RELATIONS ANALYST, RANGE A

The Labor Relations Analyst, Range A, is the entry through first working level of professional labor relations work. At Range A, assignments are directly supervised and primarily structured, standard, and recurring. Duties and responsibilities require research, analysis, and the use of independent judgment and discretion to interpret and apply statutes, regulations, and policies and procedures in the field of labor relations. The scope and effect of work generally involve less complex and less controversial labor relations issues.

LABOR RELATIONS ANALYST, RANGE B

This is the full journey level for the performance of analytical staff work in the field of labor relations. Under general direction, incumbents perform complex, responsible technical labor relations staff work. Work includes diverse analytical duties involving different and unrelated processes and methods. Incumbents demonstrate a systematic, disciplined, and analytical approach to problem solving. Incumbents at this range have gained an awareness of the context of their specific labor relations role, and how it impacts the department during all phases of the collective bargaining process.

Incumbents may serve as departmental Labor Relations Officers in very small departments.

LABOR RELATIONS SPECIALIST

This is a dual function class. The first function is to serve as a supervisor over a small group of technical staff performing labor relations work. The second is to serve as a non-supervising specialist.

LABOR RELATIONS MANAGER I

This is the full supervisory level over technical staff performing labor relations work. Positions at the Manager I level have supervisory/managerial responsibility for very complex labor relations programs, working under conditions of very high independence. Incumbents normally supervise a small technical staff within a highly complex labor relations office. Positions may be allocated in departments with labor relations programs that are equivalent in complexity and responsibility of a large department.

LABOR RELATIONS MANAGER II

This is the second supervisory and program management level. Incumbents provide consultation to State management and are responsible for labor relations operations in very large departments. Incumbents serve as the highest level management staff in the department actively involved in the labor relations program and work under highly independent conditions. Typically, incumbents will supervise a full labor relations staff either directly or through subordinate supervisors.

MINIMUM QUALIFICATIONS

LABOR RELATIONS ANALYST

Either I

Education: Equivalent to graduation from a recognized four-year accredited college or university with a Bachelor's Degree in Business Administration, Human Resources/Organizational Management, Industrial/Labor Relations, Labor Studies, Law, Political Science, Public Administration, Industrial and Organizational Psychology, or other closely related field. (Registration as a senior in a recognized college/university will admit applicants to the examination, but they must provide evidence of graduation or its equivalent before they can be considered eligible for appointment.)

Or

One year of experience in the California state service performing the duties of a Staff Services Analyst, Range B. (Persons applying experience toward this Pattern must have had the equivalent of a full-time assignment in the California state service performing specialized employer-employee relations duties for State departments and agencies.) (Applicants who have completed six months of service performing the duties as specified above will be admitted to the examination, but they must satisfactorily complete one year of this experience before they can be eligible for appointment.)

Or II

One year of experience acquired in one or a combination of the following types of employer-employee relations work:

1. Labor relations research in unit determination, election certification procedures, preparation for negotiations, fact-finding, or grievance arbitration; or

2. Resolution of grievances arising under labor agreements; or

3. Negotiations or preparation of labor agreements; or

4. Consultation, meet and confer, and resolution of conflict in public sector employer-employee relations; or

5. Conciliation, mediation, or arbitration of labor disputes; or

6. Administration and/or the investigation and settlement of violation complaints in regard to State or Federal labor management relations laws.

And

Education: Equivalent to graduation from a recognized four-year accredited college or university. (Qualifying experience may be substituted for the required education on a year-for-year basis.)

LABOR RELATIONS SPECIALIST

Either I

One year of experience in the California state service performing the duties equivalent to those of a Labor Relations Analyst, Range B. (Applicants who have completed six months of service performing the duties of a Labor Relations Analyst, Range B, will be admitted to the examination, but they must satisfactorily complete one year of this experience before they can be eligible for appointment.)

Or II

Three years of responsible analytical experience in one or a combination of the following types of employer-employee relations work:

1. Resolution of grievances arising under labor agreements; or

2. Negotiation or preparation of labor agreements; or

3. Conciliation, mediation, or arbitration of labor disputes; or

4. Consultation, meet and confer, and resolution of conflict in public sector employer-employee relations; or

5. Administration or investigation and settlement of violation complaints in regard to State or Federal labor management relations laws.

And

Education: Equivalent to graduation from a recognized four-year accredited college or university. (Qualifying experience may be substituted for the required education on a year-for-year basis.)

(Either 18 quarter units or 12 semester units from an accredited college level labor relations curriculum, or 45 quarter units or 30 semester units of graduate work in public administration, industrial relations, psychology, law, political science, or a closely related field may be substituted for one year of the required experience.)

LABOR RELATIONS MANAGER I

Either I

One year of experience in the California state service performing the duties equivalent to those of a Labor Relations Specialist.

Or II

Four years of responsible analytical experience in one or a combination of the following types of employer-employee relations work:

1. Resolution of grievances arising under labor agreements; or

2. Negotiation or preparation of labor agreements; or

3. Conciliation, mediation, or arbitration of labor disputes; or

4. Consultation, meet and confer, and resolution of conflict in public sector employer-employee relations; or

5. Administration or investigation and settlement of violation complaints in regard to State or Federal labor management relations laws.

And

Education: Equivalent to graduation from a recognized four-year accredited

college or university. (Qualifying experience may be substituted for the required education on a year-for-year basis.)

(Either 18 quarter units or 12 semester units from an accredited college level labor relations curriculum, or 45 quarter units or 30 semester units of graduate work in public administration, industrial relations, psychology, law, political science, or a closely related field may be substituted for one year of the required experience.)

LABOR RELATIONS MANAGER II

Either I

One year of experience in the California state service performing the duties equivalent to those of a Labor Relations Manager I.

Or II

Five years of responsible analytical experience in one or a combination of the following types of employer-employee relations work:

1. Resolution of grievances arising under labor agreements; or

2. Negotiation or preparation of labor agreements; or

3. Conciliation, mediation, or arbitration of labor disputes; or

4. Consultation, meet and confer, and resolution of conflict in public sector employer-employee relations; or

5. Administration or investigation and settlement of violation complaints in regard to State or Federal labor management relations laws.

And

Education: Equivalent to graduation from a recognized four-year accredited college or university. (Qualifying experience may be substituted for the required education on a year-for-year basis.)

(Either 18 quarter units or 12 semester units from an accredited college level labor relations curriculum, or 45 quarter units or 30 semester units of graduate work in public administration, industrial relations, psychology, law, political science, or a closely related field may be substituted for one year of required experience.)

KNOWLEDGE AND ABILITIES

LABOR RELATIONS ANALYST

Knowledge of: General principles, practices, and trends of labor-management relations, public administration, human resources, or business administration; research and data collection techniques; communication techniques for gathering, evaluating, and transmitting information; and English language such as proper punctuation, grammar, the meaning and spelling of words, pronunciation of words, and rules of composition in order to effectively communicate in writing and verbally to others.

Ability to: Read, analyze, and logically interpret and apply appropriate laws, rules, regulations, memoranda of understanding, policies, procedures, and instructions; plan, organize, and conduct research, and investigatory and statistical work; reason logically, analyze situations, and develop and evaluate alternatives and take effective action; accurately secure, evaluate, analyze, and record facts; prepare clear and succinct reports, graphs,

correspondence, and statistical reports; comprehend written material; communicate effectively verbally and/or in writing; consult and advise interested parties; use good judgment and make sound decisions in critical situations; establish and maintain cooperative relations and gain confidence with those contacted in the work environment; and handle stressful and/or sensitive situations with tact and labor-management diplomacy.

LABOR RELATIONS SPECIALIST

Knowledge of: All of the above, and the collective bargaining process in the private or public sectors; principles of management rights, representation rights, and unfair practices; State and Federal labor law applicable to the public sector; the principles and scope of collective bargaining; standard negotiating strategies, tactics, and impasse procedures; grievance handling procedures; data sources pertaining to public sector employer-employee relations; and the personnel management system of the State.

Ability to: Work effectively with all levels of management; interpret and apply labor law and labor agreement provisions; develop training programs in employer-employee relations for management; obtain, analyze, evaluate, and apply data such as labor statistics and cost figures; research and write reports; communicate effectively; use good judgment and make sound decisions in critical situations; and handle stressful or sensitive situations with tact and labor-management diplomacy.

LABOR RELATIONS MANAGER I
LABOR RELATIONS MANAGER II

Knowledge of: All of the above, and patterns in public negotiations and arbitration decisions; administrative procedures and practices for processing grievances up to and including arbitration; the principles of supervision and training; and a manager's/supervisor's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment which is free of discrimination and harassment.

Ability to: All of the above, and supervise, train, and evaluate staff, maintain consistency and obtain program objectives; coordinate employer-employee relations activities between departments, employee organizations, and the management team; address large groups clearly and concisely; and work cooperatively and maintain control when meeting with organizations, sometimes under severe emotional pressure and after long hours of negotiations; and effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Labor Relations Analyst	03/14/1979	07/01/2009	--
Labor Relations Specialist	03/14/1979	07/01/2009	09/05/1989
Labor Relations Manager I	03/14/1979	07/01/2009	09/05/1989
Labor Relations Manager II	03/14/1979	07/01/2009	09/05/1989

SPEC: LIBRARIAN SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

LIBRARIAN
Series Specification
(Established December 16, 1970)

SCOPE

This series specification describes five class levels used to perform professional librarian functions. These classes are used in the California State Library as the primary program classes, in departmental libraries, and in law and medical libraries. Positions are assigned responsibilities requiring a full professional knowledge of the objectives, principles, and theories of librarianship; evaluation of materials, information, and research; assessment of proposals; the ability to keep informed of and to evaluate studies and developments in the profession; the ability to conduct library-focused research; knowledge of computer and telecommunications systems employed in professional library programs; and the ability to employ modern methods of supervision to direct library programs.

Schem Code	Class Code	Class
FM50	2951	Librarian
FM41	2943	Senior Librarian
FM40	2944	Supervising Librarian I
FM30	2935	Supervising Librarian II
FM20	2917	Principal Librarian

DEFINITION OF SERIES

Positions in these classes employ modern library programs including computerized programs and databases in collection development, acquisition, cataloging and classification, reference, circulation, and preservation of library materials; provide clientele with timely and relevant information in a cost-effective manner; provide access to and guidance in the use of information resources, both within the physical confines of the library and beyond the library through databases, telecommunication networks, and cooperative arrangements; provide services and information through print and special format materials (books, journals, photographs, videotapes, and electronic databases), bibliographic citations, and other reference information; provide direction to clients on how to locate relevant information which answers clients' questions; organize and classify materials; preserve and store physical holdings; keep informed of the latest library program and information technology developments as they relate to the performance of library functions; supervise professional and technical library staff either directly or through subordinate supervisors; and may have charge of a specialized library function including a law or medical library or a specialized library collection, or direct the work of a major subdivision of the California State Library.

FACTORS AFFECTING POSITION ALLOCATION

Factors affecting position allocation include the level, variety, library size and complexity of work, independence of action, degree of supervisory responsibility, and role in program and policy formulation and implementation.

DEFINITION OF LEVELS

LIBRARIAN

This is the entry and full professional level in the series. Incumbents may either (1) perform professional work to collect, acquire, catalogue and classify, provide reference to, circulate, develop, use computerized databases for, and preserve library material; or (2) have full responsibility for a small- to medium-size departmental library of average complexity.

SENIOR LIBRARIAN

This is the advanced professional level in the series used to perform the most complex, specialized, and responsible nonsupervisory work. Incumbents may work either (1) as a lead over a small group of other professional librarians; or (2) as an expert in a specialized collection or function or may perform complex analytical work in the development and administration of special library services; or (3) in a departmental library, work as a lead over other library staff or perform highly specialized functions in the largest, most complex libraries.

SUPERVISING LIBRARIAN I

This is the working supervisory level in the series. Incumbents either (1) supervise a small staff including professional librarians and/or technical and clerical personnel; (2) act as an assistant supervisor for a major unit of the California State Library or in the largest most complex departmental libraries; or (3) are in charge of a medium to large departmental library which includes professional librarians and/or technical and clerical staff.

SUPERVISING LIBRARIAN II

This is the full supervisory level in the series. Positions in this class either (1) plan, organize, and direct a medium to large staff of professional librarians involved in the work of a major function of the California State Library; or (2) direct the work of the largest, most complex departmental libraries or a large departmental medical or law library.

PRINCIPAL LIBRARIAN

This is the highest supervisory level in the series. Incumbents either (1) plan, organize, and direct the work of a major subdivision of the California State Library; or (2) plan, organize, and direct the work of multiple libraries in a large department; or (3) plan, organize, and direct work of the law library at the California State Library or the Department of Justice.

MINIMUM QUALIFICATIONS

Education Requirements

ALL LEVELS:

Equivalent to graduation from a college or university and completion of a graduate degree from an accredited library school.

(For the Librarian class only, registration as a graduate student in a library school will admit applicants to the examination, but evidence of completion of the required graduate degree must be submitted before an applicant can be considered eligible for appointment.)

Experience Requirements

LIBRARIAN

See "Education Requirements."

SENIOR LIBRARIAN

Either I

Two years in the California state service performing professional librarian duties at a level of responsibility equivalent to that of a Librarian.

Or II

Three years of increasingly responsible and varied professional library experience, such as cataloging, reference work, library service projects, and the selection of library materials, at least one year of which must have included regular use of computerized databases.

SUPERVISING LIBRARIAN I

Either I

Two years in the California state service performing professional librarian duties at a level of responsibility equivalent to that of a Librarian.

Or II

Three years of increasingly responsible and varied professional library experience, such as cataloging, reference work, library service projects, and the selection of library materials, at least one year of which must have included regular use of computerized databases.

SUPERVISING LIBRARIAN II

Either I

One year in the California state service performing professional librarian duties at a level of responsibility equivalent to that of a Senior Librarian or a Supervising Librarian I.

Or II

Three years of experience performing professional librarian duties at a level of responsibility equivalent to that of a Librarian.

Or III

Four years of increasingly responsible and varied professional

library experience such as having charge of a small library or subordinate section of a major library, at least one year of which shall have been comparable in level of responsibility to a Supervising Librarian I.

PRINCIPAL LIBRARIAN

Either I

One year in the California state service performing professional librarian duties at a level of responsibility equivalent to that of a Supervising Librarian II.

Or II

Two years of experience performing professional librarian duties at a level of responsibility equivalent to that of a Supervising Librarian I or a Senior Librarian.

Or III

Five years of increasingly responsible and varied professional library experience, at least two years of which shall have been comparable in level of responsibility to a Supervising Librarian II in charge of a major section of a large library or a large independent branch library.

KNOWLEDGE AND ABILITIES

LIBRARIAN

Knowledge of: Theories, objectives, principles, and techniques of librarianship; standard reference materials; established techniques and practices for classifying and cataloging materials such as the Dewey decimal system and the Library of Congress system; reference interviewing techniques, standard search strategies, commonly used bibliographic information sources, and professional journals in the library field; computer systems search capabilities; library purposes, trends, and organizations.
Ability to: Apply professional knowledge to the practical problems of the job; establish and maintain cooperative relationships with library users, coworkers, supervisors, and others contacted during the course of work; provide effective customer services; use computer programs, systems, and databases to perform professional library functions; analyze situations accurately and take effective action; communicate effectively.

SENIOR LIBRARIAN

Knowledge of: All of the above, and complex bibliography terminology; subject fields and where they are located within the California Government; programs of major libraries in California.

Ability to: All of the above, and provide leadership and apply creativity in the formulation of needed changes in complex library program methods and procedures; modify standard library practices and techniques; adapt computer programs and systems for library program use.

SUPERVISING LIBRARIAN I

Knowledge of: All of the above, and principles and practices of supervision; a supervisor's responsibility for promoting equal

opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment.

Ability to: All of the above, and plan, organize, direct, and evaluate the work of professional and technical and/or clerical personnel; effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

SUPERVISING LIBRARIAN II

Knowledge of: All of the above, and advanced, complex problems of reference, research methods, cataloging, and other major library functions; principles of employee development and training; library administration and finance; economic and social trends as they relate to library program development; the Department's mission, goals, policies, and programs.

Ability to: All of the above.

PRINCIPAL LIBRARIAN

Knowledge of: All of the above, and modern methods of program evaluation.

Ability to: All of the above, and develop and evaluate program criteria; effectively direct major library programs and the work of professional library staff; work effectively with top level management staff.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Librarian	12/13/46	8/3/99	12/16/70
Senior Librarian	5/20/86	8/3/99	8/3/99
Supervising Librarian I	5/7/54	8/3/99	8/3/99
Supervising Librarian II	5/7/54	8/3/99	8/3/99
Principal Librarian	5/7/54	8/3/99	12/16/70

SPEC: LIMITED EXAMINATION AND APPOINTMENT PROGRAM CANDIDATE
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	KC84
Class Code:	4687
Established:	4/4/84
Revised:	--
Title Changed:	7/24/84

LIMITED EXAMINATION AND APPOINTMENT PROGRAM CANDIDATE (IDENTIFIED CLASS)

DEFINITION

Under close supervision, to demonstrate the ability to perform the major job tasks required of the parallel class (parenthetically identified) for which the candidate is being evaluated.

DISTINGUISHING CHARACTERISTICS

Limited Examination and Appointment Program Candidate (Identified Class) is used for initial TAU appointments to evaluate the skills and performance of participants in the Limited Examination and Appointment Program prior to probationary appointment to the parallel class.

MINIMUM QUALIFICATIONS

The same as for the parallel class for which the candidate is being evaluated. Department of Rehabilitation (or other approved organization) certification that the candidate meets the State Personnel Board's goal-setting criteria for disability.

SALARY

Based upon the salary range of the parallel class for which the candidate is being evaluated.

SPEC: MAILING MACHINES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

MAILING MACHINES
Series Specification
(Established May 8, 1975)

SCOPE

This series specification describes four classifications which perform or supervise a variety of tasks related to the machine processing of large volumes of outgoing United States and other carrier mail.

Schem Code	Class Code	Class
CK03	1779	Mailing Machines Operator I
CK04	1780	Mailing Machines Operator II
CK07	1459	Mailing Machines Supervisor I
CK08	1463	Mailing Machines Supervisor II

DEFINITION OF SERIES

Classes in the Mailing Machines series are distinguished from other clerical classes by being regularly required to operate machines in processing large volumes of outgoing United States and other carrier mail. Incumbents in these classes must possess knowledge of postal regulations and rates related to the processing of first, second, third (including bulk), and fourth class, registered, parcel post, air, certified, insured, and United Parcel mail. The mails processed in outgoing mail units leave in final form with proper postage affixed and sorted by zip code. Incumbents in this series are required to operate a variety of machines. These machines are divided into two categories, those needed to assist in registering the proper postage, including meter mailing machines and scales, and those needed in other parts of the outgoing mailing process including decollators, bursters, letter inserters, folding machines, and tying machines. Incumbents are required to calibrate the machines for different types and sizes of material and perform maintenance and minor repair on the machines. Incumbents are responsible for maintaining the proper order and sequence of material during processing and maintaining stock of material needed in mail processing. In some work settings, incumbents may occasionally operate a small forklift in moving supplies and processed mail. Incumbents maintain records of cost and production; check and regulate work flow; review the quality and quantity of production; maintain discipline and enforce safety rules and regulations.

Positions that do not require in-depth knowledge of postal regulations and rates, and that spend the majority of their time hand sorting or stuffing envelopes or weighing mail and affixing postage, should be allocated to the Office Assistant series.

ENTRY LEVEL

Entry into this series typically will be at the Mailing Machines Operator I level.

FACTORS AFFECTING POSITION ALLOCATION

Variety and complexity of work, independence of action and decision, knowledge and skills required; supervision received and exercised will serve as factors when allocating positions, as well as the types and variety of machinery operated.

DEFINITION OF LEVELS

MAILING MACHINES OPERATOR I

This is the entry, learning and full working level for the series. Under close supervision and in accordance with established procedures, incumbents perform increasingly difficult duties related to the processing of large volumes of outgoing United States and other carrier mail; learn to operate the machinery required in the work; and perform other related work.

Incumbents may perform in a lead capacity assisting subordinate clerical employees.

MAILING MACHINES OPERATOR II

This is the mailing machine expert/specialist level in the series. Under general direction incumbents operate on a full-time basis the most complex multi-function machinery; may also act as a lead person over a small group of Mailing Machines Operators and clericals where the size of the work unit precludes allocation of a supervisory level within this series.

MAILING MACHINES SUPERVISOR I

Under general supervision, incumbents are responsible for supervising, planning, coordinating, and directing subordinate clerical staff in a large volume mailing operation unit in processing of outgoing United States and other carrier mail. Incumbents typically supervise from 5 - 15 subordinate clerical employees including at least 3 Mailing Machines Operators.

MAILING MACHINES SUPERVISOR II

This is the highest supervising level in this series. Under general direction, incumbents at this level are responsible for supervising, planning, coordinating, training and directing the work in a large volume mailing operation containing several units or more than one shift in processing outgoing United States and other carrier mail. Incumbents typically supervise a large staff of subordinate clerical employees including at least three Mailing Machine Supervisors I.

MINIMUM QUALIFICATIONS

MAILING MACHINES OPERATOR I

Either I

Completion of a formal work experience training program in machines operations, such as those offered under the Manpower Development Training Act (MDTA), the Job Corps, the Neighborhood Youth Corps, the Concentrated Employment Program (CEP), the Work Incentive Program (WIN), or similar programs operated by State, Federal or local agencies.

Or II

One year of experience performing clerical duties related to outgoing mail functions in the California state service at a level of responsibility equivalent to that of Office Assistant I (General).

Or III

One year of experience operating a variety of mailing machines in the processing of outgoing United States mail.

MAILING MACHINES OPERATOR II

Either I

One year of experience in the California state service performing the duties of a Mailing Machines Operator I, Range B.

Or II

Three years of experience operating a variety of mailing machines in the processing of outgoing United States mail. (Experience in the California state service must include one year of performing the duties of a Mailing Machines Operator I, Range B.)

MAILING MACHINES SUPERVISOR I

Either I

One year of experience in the California state service performing the duties of a Mailing Machines Operator I, Range B, or Mailing Machines Operator II.

Or II

Three years of varied experience in the operation of mailing machines in a large volume mailing operation. (Experience in the California state service must include one year of experience performing the duties of a Mailing Machines Operator I, Range B, or a Mailing Machines Operator II.)

MAILING MACHINES SUPERVISOR II

Either I

One year of experience in the California state service performing the duties of a Mailing Machines Supervisor I.

Or II

Two years of experience in the California state service performing the duties of a Mailing Machines Operator I, Range B, or Mailing Machines Operator II.

Or III

Five years of experience operating a variety of mailing machines in the processing of outgoing United States mail, at least two years of which shall have been in a supervisory capacity. (Experience in the California state service must include one year of experience performing the duties of a Mailing Machines Supervisor I.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Postal regulations related to postage; types of mail; zip code sorting techniques; the operation and maintenance of mailing machines and related equipment.

Ability to: Carry out oral and written directions; learn rapidly the operating details of mailing machines and related equipment; operate, adjust and maintain equipment in good operating condition; meet deadlines; read and write at a level required for successful job performance; maintain records; and work well with others.

MAILING MACHINES SUPERVISOR I

Knowledge of: All of the above, and the capabilities of various mailing machines and related equipment and their application to various job requests; procedures of various United States and other carriers, and current rates in relation to various job requests; current development in methods, materials and equipment; principles and techniques of effective supervision; the Department's Affirmative Action Program objectives; a supervisor's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and repair various mailing machines and related equipment; provide direction, train, and supervise small groups of employees; analyze situations and adopt an effective course of action; estimate costs; maintain records and write reports; effectively contribute to the Department's affirmative action objectives.

MAILING MACHINES SUPERVISOR II

Knowledge of: All of the above, plus principles of organization and management; modern office methods and procedures.

Ability to: All of the above, and coordinate the work of assistants; supervise and train a mailing operation unit through subordinate supervisors.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

A mechanical aptitude and interest in machinery; neatness; orderliness; alertness; manual dexterity; a willingness to follow a prescribed routine; ability to stand for long periods of time and work in noisy surroundings, and good eyesight.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Mailing Machines Operator I	12/20/88	--	--

Mailing Machines Operator II	12/20/88	--	--
Mailing Machines Supervisor I	5/8/75	12/20/88	12/20/88
Mailing Machines Supervisor II	2/2/83	12/20/88	12/20/88

SPEC: MANAGEMENT SERVICES TECHNICIAN
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	JY40
Class Code:	5278
Established:	6/8/77
Revised:	6/12/89
Title Changed:	--

MANAGEMENT SERVICES TECHNICIAN

DEFINITION

Under supervision, to learn and perform the less technical, semiprofessional tasks of a management services or related discipline, either (1) on a permanent basis, or (2) in training in preparation for promotion to the professional level; and to do other related work.

TYPICAL TASKS

In Employment Relations: Researches, gathers, and analyzes information for use in investigations and in adjusting complaints; may prepare reports.

In Tax Compliance: Performs the most routine work of tax law enforcement.

In Budgeting, Auditing or Management Analysis: Prepares less difficult budgeting, auditing, technical, or related reports, and may be responsible for an assigned routine segment of budgeting, auditing or related work.

In Data Processing: Performs the less difficult systems analysis and may be assigned a routine segment of systems analysis.

In Accounting: Takes corrective action on balance reports and may maintain less complex accounting records.

In Program Analysis: Performs the less complex gathering and analysis of program information.

MINIMUM QUALIFICATIONS

Either I

One year of experience performing the duties of a Management Services Assistant. (Applicants who have completed six months of service performing the duties as specified above will be admitted to the examination, but they must complete one year of this experience before they can be eligible for appointment.)

Or II

One year of experience in the California state service performing duties at a level of responsibility equivalent to that of Office

Assistant (General), Range B.

Or III

Sixty semester or 90 quarter units of college.

KNOWLEDGE AND ABILITIES

Knowledge of: Arithmetic, spelling, grammar, punctuation, and modern English usage.

Ability to: Learn rapidly; follow directions; communicate effectively with other staff and those contacted in the work; use good work habits such as punctuality, skill, neatness and dependability; make satisfactory progress in a prescribed training program; interpret written material; edit written material; write effectively; analyze written and numerical data accurately; make clear, concise oral presentations.

SPECIAL AND PERSONAL CHARACTERISTICS

Both demonstrated interest in and aptitude for work in one of the staff services or related disciplines, and the capacity for professional development.

DESIRABLE QUALIFICATIONS

Experience and/or education applied toward Patterns I and II which has developed verbal, analytical, numerical, and/or writing skills is preferable.

SPEC: MICROFILM TECHNICIAN
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

MICROFILM TECHNICIAN
Series Specification
(Established April 21, 1976)

SCOPE

The Microfilm Technician series specification describes four classes in the California state service which perform or supervise microfilm services.

Schem Code	Class Code	Class
CL40	1480	Microfilm Technician I
CL45	1481	Microfilm Technician II
CL50	1482	Senior Microfilm Technician
CL55	1483	Supervising Microfilm Technician

DEFINITION OF SERIES

Microfilm Technicians are engaged in the production, storage, and retrieval of microfilm and maintenance of microfilm equipment. Microforms produced include cartridges, 35mm and 16mm roll film, microfiche and aperture cards. Entry into this series typically will be at the Microfilm Technician I level.

ENTRY LEVEL

Entry into this series is typically at the level of Microfilm Technician I.

FACTORS AFFECTING POSITION ALLOCATION

Level of difficulty and complexity of duties; degree of supervision received and exercised; complexity of a department's microfilm production lab; type of equipment used; scope of knowledge and abilities required; and degree of independence and decision-making responsibility.

DEFINITION OF LEVELS

MICROFILM TECHNICIAN I

This is typically the entry level and training class of the series. Under general supervision, incumbents have responsibility for and participate in the operation and maintenance of photographic and film processing equipment used in a high-volume microphotography operation that requires highly accurate reduction and resolution. Microfilm Technicians I operate a variety of microfilm equipment including rotary and planetary cameras in the volume filming of records, maps,

drawings and documents; diazo film duplicators and jacket fillers; photograph within close tolerance of lighting and reduction to yield microfilm images of high resolution and proper size; blip-encode film for indexing purposes; load film into various types of cartridges; use computerized data bases and retrieval systems to help locate individual microfilm images; and perform key data entry of information used to title aperture cards or to comprise a data base of fields in a computer-assisted microfilm retrieval system.

Microfilm Technicians I typically load and change camera units; feed documents into a machine; operate a reversal mechanism to film both sides of a document; insert flash cards to indicate changes in sequence or to identify documents; adjust exposure intensity and make changes in reduction ratios to established standards; clean and maintain equipment, including replacing lamps, cleaning glass and optical surfaces and making minor repairs and adjustments; ready documents by trimming and removing staples; code film boxes; keep production records; inspect and splice processed film; operate microfilm reader-viewers and reader-printers; and assist customers in locating microfilm and making copies.

MICROFILM TECHNICIAN II

This is the journey level of the series. Under general supervision, incumbents have responsibility for and participate in the operation and maintenance of complex photographic and film processing equipment used in a high volume microphotography operation that requires highly accurate reduction and resolution.

Incumbents in the Microfilm Technician II classification typically set camera positions to desired reduction ratios; interpolate optimal voltage settings using a light meter or book of graded samples; adjust subsurface lighting; make test films of reflectance and resolution targets to facilitate standardization of film processing; use precision instruments such as sensitometers, densitometers, and microscopes to control quality; adjust planetary cameras as needed to provide even density on all film to be processed; operate and adjust microfilm processing machines to prevent drag and to control speed of film flow through the machines; control chemical solutions and wash to insure obtaining film of archival quality; locate and correct sources of film damage from scratching, spotting and streaking or other film imperfections; control film and chemical supplies to insure fresh quality and proper storage; inspect stored film for signs of deterioration; clean and maintain the equipment and make minor repairs and adjustments; and may act in a lead capacity.

SENIOR MICROFILM TECHNICIAN

Under general supervision, incumbents supervise a small (3-9) microfilm unit of microfilm technicians and clericals. Positions can also be found in large microfilm operations where they assist a Supervising Microfilm Technician.

Senior Microfilm Technicians typically film records and documents within close tolerances of scale and resolution; coordinate camera operation and microfilm processing; supervise the photographing of test films and resolution targets for standardization of film processing; and supervise the maintenance, adjustment and repair of

camera and film processing equipment.

SUPERVISING MICROFILM TECHNICIAN

Under general direction, incumbents plan, organize and direct the work of a large staff (10 to 20) engaged in microfilm production and the storage and retrieval of microfilmed information.

Supervising Microfilm Technicians typically direct the work of a large staff engaged in the production of microfilm utilizing such equipment as planetary and rotary cameras, card copiers, film processors, film mounters, densitometers and microscopes; develop and maintain microfilm information retrieval systems; recommend replacement and purchase of equipment; test and evaluate new equipment and methods; direct repair and minor adjustments of equipment; advise section heads and employees on methods of reproduction most suitable to their needs; devise controls for quantity and quality production and for distribution of products; prepare the annual budget for the unit; report expenditures and production; select, train and evaluate the performance of the staff; coordinate ADP applications to microfilm retrieval systems; develop training materials; and present training sessions to departmental employees.

MINIMUM QUALIFICATIONS

MICROFILM TECHNICIAN I

Either I

In the California state service, six months of experience performing duties in a class with a level of responsibility not less than that of an Office Assistant, Range A.

Or II

Completion of a formal work experience training program in machine operations administered by State, Federal or local agencies.

Or III

One year of microfilm production experience.

MICROFILM TECHNICIAN II

Either I

In the California state service, one year of experience performing the duties of a Microfilm Technician I, Range B.

Or II

Two years of varied and increasingly difficult microfilm production experience.

SENIOR MICROFILM TECHNICIAN

Either I

In the California state service, one year of experience performing the duties of a Microfilm Technician II.

Or II

In the California state service, two years of experience performing the duties of a Microfilm Technician I, Range B.

Or III

Three years of increasingly complex microfilm experience, at least one year of which must have been in a supervisory capacity.

SUPERVISING MICROFILM TECHNICIAN

Either I

In the California state service, one year of experience performing the duties of a Senior Microfilm Technician.

Or II

Four years of increasingly complex microfilm experience, at least two years of which must have been in a supervisory capacity.

KNOWLEDGE AND ABILITIES

MICROFILM TECHNICIAN I

Knowledge of: Microfilm equipment operation; microfilm processing; aperture card production; microfiche and microthin jacket preparation; reproduction of microfilm; preparation of duplicate copies of microforms; the safety and health policies and procedures contained in the department's injury and illness prevention program; basic safe work practices.

Ability to: Communicate at a level required for successful job performance; carry out oral and written directions; understand the operation of technical equipment; follow prescribed routine and quality control standards.

MICROFILM TECHNICIAN II

Knowledge of: All the above and photographic processes; indexing and data retrieval systems; planetary and rotary cameras; film processors; densitometers.

Ability to: Perform all of the above and the more difficult phases of microfilm work, including producing to scale and reproducing faded and damaged material; direct a subunit; train other employees in the techniques of microfilm production; operate, adjust and make minor repairs to microfilm equipment; communicate effectively both verbally and in writing.

SENIOR MICROFILM TECHNICIAN

Knowledge of: All of the above and limits and capabilities of equipment; current developments in methods, materials and equipment used in microphotography; general and film filing and retrieval systems; automatic data processing as applied to file indexing and retrieval systems; principles and techniques of personnel management; all basic reproduction methods; department's Affirmative Action Program objectives; a supervisor's role in the Affirmative Action Program and the processes available to meet affirmative action objectives; the basic safety and health regulations contained in the California Code of Regulations, Title 8 Industrial Relations, General Industry Safety Orders; a supervisor's role in maintaining an effective injury and illness prevention program.

Ability to: All of the above and work independently; supervise and coordinate the work of subordinates; design and modify efficient microfilm storage systems; and communicate effectively; effectively contribute to the department's affirmative action objectives.

SUPERVISING MICROFILM TECHNICIAN

Knowledge of: All of the above.

Ability to: All of the above and apply creativity in the design and modification of complex microfilm filing and retrieval systems; plan a budget; analyze situations accurately and take effective action.

ALTERNATE RANGE CRITERIA

These criteria will be used to allocate incumbents to Alternate Range A or Range B.

Range A. This Range shall apply to incumbents who do not meet the criteria for payment in Range B.

Range B. This Range shall apply to persons who have satisfactorily completed the equivalent of six months of Microfilm Technician I, Range A, experience or have six months of experience in operating and maintaining a variety of microfilm equipment including a rotary camera, diazo film duplicator, jacket filler and reader.

When the requirements for movement to Range B are met and upon recommendation of the appointing power, the employee shall receive the rate of Range B, under provisions of State Personnel Board Rule 98.3 and a new salary adjustment anniversary date will be established.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Microfilm Technician I	4/21/76	5/5/92	--
Microfilm Technician II	4/21/76	5/5/92	--
Senior Microfilm Technician	4/21/76	5/5/92	--
Supervising Microfilm Technician	4/21/76	5/5/92	--

SPEC: OFFICE ASSISTANT/TECHNICIAN
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

OFFICE ASSISTANT/TECHNICIAN
Consolidated Series Specification
(Established June 8, 1977)

Sachem Code	Class Code	Class
CA55	1441	Office Assistant (General)
CA52	1379	Office Assistant (Typing)
CA48	1138	Office Technician (General)
CA46	1139	Office Technician (Typing)

DEFINITION OF SERIES

This consolidated series specification describes four classes in which employees learn and perform a variety of general office work. General office duties include: typing, dictation and transcription; mail and document handling; filing and records management; document preparation and review; composition of correspondence; oral communications; statistical and other record keeping; cashiering; and ordering and maintaining supplies and equipment. Employees in this series may be regularly required to have particular knowledge and/or proficiency in such special areas as typing, cashiering, and information services. Classes which do not conform to the "Definition of Levels" section or have other salary structures are excluded from this consolidated series specification.

Each special area of general office work incorporated into this specification will utilize only the class(es) that appropriately describes the type and level of work performed and the duties and responsibilities assigned to positions which are comparable to the appropriate level(s) described in this consolidated series specification. Not every special area of general office work will utilize all the levels contained in this consolidated series specification.

Office Assistant (General), Office Assistant (Typing), Office Technician (General) and Office Technician (Typing) may instruct, lead or supervise inmates, wards or resident workers.

FACTORS AFFECTING POSITION ALLOCATION

Relative level of variety and complexity of duties, initiative and independence of action, degree of supervision received and exercised, public contact, consequence of error, and knowledge and abilities are factors used in differentiating between levels.

DEFINITION OF LEVELS

OFFICE ASSISTANT (VARIOUS CLASSES)

This is the entry, trainee and journey level for this series. Under close supervision as a trainee, incumbents regularly perform a limited range of duties that become routine, shortly after the initial training period; and/or learns to perform a variety of full journey level general clerical duties.

Under general supervision, incumbents at the full journey level regularly perform a variety of duties requiring adaptation to various situations, judgment as to which learned work method to apply for the desired result, and the ability to communicate effectively. This level may have lead responsibility over less experienced employees in areas such as training and answering questions on work procedures.

OFFICE TECHNICIAN (VARIOUS CLASSES)

This is the advanced journey level which regularly performs a variety of the most difficult duties and is expected to consistently exercise a high degree of initiative, independence and originality in performing assigned tasks. Positions at this level regularly require detailed and sensitive public contact and/or independent origination of correspondence involving the knowledge and application of detailed regulations, policies and procedures (e.g., positions such as secretaries to major division chiefs and one-person field office assignments comprised of a wide variety of responsibilities). Good judgment and the ability to communicate effectively is of primary importance at this level. Typically, the work at this level is rarely reviewed. In addition, positions may have responsibility for functional guidance in training and assisting less experienced employees.

SCOPE OF OFFICE ASSISTANT/TECHNICIAN (VARIOUS CLASSES)

OFFICE ASSISTANT/TECHNICIAN (GENERAL)

Positions allocated to this area are distinguished from other clerical classes by being required to perform any combination of the general office duties listed in the "Definition of Series" but should not require a specific degree of proficiency in an area such as typing.

OFFICE ASSISTANT/TECHNICIAN (TYPING)

Positions allocated to this special area are distinguished from other clerical classes by being regularly required to perform typing duties as an essential part of the job which may include any combination of the general office duties listed in the "Definition of Series". Typically, typing encompasses a significant proportion of the work time.

MINIMUM QUALIFICATIONS

OFFICE ASSISTANT (GENERAL)

Either I

One year of experience in California state service performing the duties of an Assistant Clerk.

Or II

Education: Either equivalent to completion of the twelfth grade; or completion of a business school curriculum; or completion of a clerical work experience training program such as those offered through the Welfare Reform Act. (One year of clerical work experience may be substituted for the required education.)

OFFICE ASSISTANT (TYPING)

Either I

One year of experience in California state service performing the duties of an Assistant Clerk.

Or II

Education: Either equivalent to completion of the twelfth grade; or completion of a business school curriculum; or completion of a clerical work experience training program such as those offered through the Welfare Reform Act. (One year of clerical work experience may be substituted for the required education.)

OFFICE TECHNICIAN (GENERAL)

Either I

One year of experience in California state service performing clerical duties at a level of responsibility equivalent to that of an Office Assistant, Range B.

Or II

Experience: Two years of clerical experience. [Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience. Students who are enrolled in the last semester or its equivalent of course work which upon completion will fulfill these requirements will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.]

OFFICE TECHNICIAN (TYPING)

Either I

One year of experience in California state service performing clerical duties at a level of responsibility equivalent to that of an Office Assistant, Range B.

Or II

Experience: Two years of experience in typing and clerical work. [Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience. Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.]

KNOWLEDGE AND ABILITIES

OFFICE ASSISTANT (VARIOUS CLASSES)

Ability to: Perform clerical work, including ability to spell correctly; use good English; make arithmetical computations; operate various office machines; follow oral and written directions; evaluate situations accurately and take effective action; read and write English at a level required for successful job performance.

OFFICE TECHNICIAN (VARIOUS CLASSES)

Knowledge of: Modern office methods, supplies and equipment; business English and correspondence; principles of effective training.

Ability to: Perform difficult clerical work, including ability to spell correctly; use good English; make arithmetical computations; operate various office machines; follow oral and written directions; evaluate situations accurately and take effective action; read and write English at a level required for successful job performance; make clear and comprehensive reports and keep difficult records; meet and deal tactfully with the public; apply specific laws, rules and office policies and procedures; prepare correspondence independently utilizing a wide knowledge of vocabulary, grammar and spelling; communicate effectively; provide functional guidance.

SPECIAL REQUIREMENT

OFFICE ASSISTANT/TECHNICIAN (TYPING)

Ability to: Type at a speed of not less than 40 words per minute from ordinary manuscript or printed or typewritten material.

SPECIAL PERSONAL CHARACTERISTIC

OFFICE ASSISTANT/TECHNICIAN (VARIOUS CLASSES)

A demonstrated interest in assuming increasing responsibility.

ADDITIONAL DESIRABLE QUALIFICATION

OFFICE ASSISTANT/TECHNICIAN (VARIOUS CLASSES)

Education equivalent to completion of the twelfth grade.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Office Assistant			
(General)	4/1/89	9/12/90	--
(Typing)	4/1/89	9/12/90	--
Office Technician			
(General)	10/1/77	9/12/90	--

(Typing)	10/1/77	9/12/90	--

SPEC: OFFICE SERVICES MANAGER I
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	CA20
Class Code:	1103
Established:	4/25/84
Revised:	6/8/77
Title Changed:	6/8/77

OFFICE SERVICES MANAGER I

DEFINITION

Under direction, through subordinate supervisors, to be responsible for the overall planning, directing, and coordination of varied and extensive clerical activities involving direction of as few as approximately 30 employees where the work performed is varied and complex or direction of approximately 150 employees in several subunits where the duties are comparatively routine; and to do other related work.

DISTINGUISHING CHARACTERISTICS

The level of positions in the Office Services Manager class series is determined not only by the size of the operation supervised but particularly by the level of the position in the administrative structure of the agency; the size, number, and variety of sections supervised and the type and complexity of duties performed in those sections. Office Services Manager I is the entrance class in the Office Manager series.

TYPICAL TASKS

Plans, organizes, assigns, and reviews the work of varied and extensive processing and service units engaged in clerical and related office activities; through subordinate supervisors, approves and reviews work procedures and makes decisions on the more difficult operating and personnel problems; supervises the planning and flow of office work between units and to various subdivisions of the agency; reviews, evaluates, and recommends changes of policies and operating procedures; prepares the budget for the units supervised; studies need for office equipment and supplies, writes specifications, and prepares estimates of amounts and costs of equipment and supplies needed; develops production standards; may be responsible for general office and equipment maintenance; designs and revises office forms; assists in the selection of subordinate supervisors, trains them, and evaluates their performance, and takes or recommends appropriate action; develops performance standards and prepares and reviews Reports of Performance; assists staff in the preparation and revision of procedure manuals and the instructions for their use; confers with superiors and coordinates efforts of the office with other State departments and the public; dictates correspondence and prepares reports.

MINIMUM QUALIFICATIONS

Either I

One year of experience in the California state service performing the duties of a class with a level of responsibility not less than Office Services Supervisor III (formerly Supervising Clerk II).

Or II

Three years of experience supervising a clerical section normally involving at least 15 employees. This experience must have included responsibility for planning, organizing, and coordinating the work; establishing procedures; selecting, training, and evaluating personnel and employee relations. [Experience in the California state service applied toward this requirement must have been performing the duties of a class with a level of responsibility not less than Office Services Supervisor II (formerly Supervising Clerk I).]

KNOWLEDGE AND ABILITIES

Knowledge of: Office organization and management principles and methods including office layout and organization, and modern methods of performing various kinds of clerical work and measuring work production; office materials, supplies, and modern equipment and ability to use them effectively; principles of personnel management and effective supervision; Department's Affirmative Action Program objectives; a manager's role in the affirmative action program and the processes available to meet affirmative action objectives.

Ability to: Read and write English at a level required for successful job performance; apply office organization and management principles and methods including office layout and organization, and modern methods of performing various kinds of clerical work and of measuring work production; plan, organize, direct, and review of the work of a large clerical staff; learn rapidly specific laws, rules, and office policies and procedures and use good judgment in applying them in a variety of cases; design and standardize effective and economical office forms; prepare reports and dictate correspondence independently; analyze situations accurately and take effective action; secure and maintain cooperative relationships with all persons contacted in the work; effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTIC

Demonstrated supervisory ability.

ADDITIONAL DESIRABLE QUALIFICATION

Education equivalent to completion of the twelfth grade.

SPEC: OFFICE SERVICES SUPERVISOR (VARIOUS CLASSES)
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

OFFICE SERVICES SUPERVISOR
(VARIOUS CLASSES)
Consolidated Series Specification
(Established June 8, 1977)

Schem Code	Class Code	Class
		Office Services Supervisor I
CA38	1141	(General)
CA36	1148	(Typing)
		Office Services Supervisor II
CA28	1150	(General)
		Office Services Supervisor III
CA23	1151	(General)

DEFINITION OF SERIES

This consolidated series specification describes three levels of classes that train, plan, organize, and direct a staff of clerical employees who perform a variety of general office and related clerical support tasks, including functions as typing, stenography, filing, accounting, cashiering, statistics and others.

If a separate class for a specific specialty is required at any level, this can be accomplished by use of the core specification with the specialty indicated in parentheses following the core class title.

Office Services Supervisor I (General), Office Services Supervisor I (Typing) and Office Services Supervisor II (General) may instruct, lead or supervise inmates, wards or resident workers.

FACTORS AFFECTING POSITION ALLOCATION

The level of difficulty, variety, complexity of assigned duties, independence of action and decisions; supervision received and the degree of supervision exercised; sensitivity of public contact; and the consequence of error serve as differentiating factors between classes.

DEFINITION OF LEVELS

OFFICE SERVICES SUPERVISOR I (VARIOUS CLASSES)

This is the working supervisor level. Under general supervision, incumbents train new employees, supervise a small group engaged in difficult clerical work and personally perform the most complex work.

OFFICE SERVICES SUPERVISOR II (VARIOUS CLASSES)

This is the first full supervisory level. Under general direction, incumbents plan, organize, and direct the work of a medium-sized group engaged in difficult clerical work.

OFFICE SERVICES SUPERVISOR III (VARIOUS CLASSES)

This is the second full supervisory level. Under general direction, and through subordinate supervisors, incumbents plan, organize, and direct the work of a large group engaged in difficult clerical work.

SCOPE OF OFFICE SERVICES SUPERVISOR (VARIOUS CLASSES)

OFFICE SERVICES SUPERVISOR (GENERAL)

The scope of the duties supervised by incumbents in the general classes include: receptionist and secretarial support; typing and word processing support; mail and document receiving and distribution; filing and records management; document preparation and review; composition of letters, procedure manuals and reports; gathering and giving of information over the telephone or by personal contact; statistical, financial, and other record-keeping functions; cashiering; and ordering and maintaining supplies and equipment.

OFFICE SERVICES SUPERVISOR (TYPING)

The scope of the duties supervised by incumbents in this specialty include: typing letters, reports, bills, vouchers, receipts, lists, schedules, orders, notices, and statistical data; preparing acknowledgments and replies from form letters; transcribing dictating machine records; preparing stencils; arranging routine material for typing; proofreading; checking columns of figures; checking and tabulating statistical data; receiving, distributing, and dispatching mail; maintaining mailing lists; securing, preparing and copying data and other information; checking and alphabetizing records and files; operating duplicating, billing, and other office machines.

MINIMUM QUALIFICATIONS

OFFICE SERVICES SUPERVISOR I (GENERAL) (TYPING)

Either I

One year of experience in California state service performing duties of a class with a level of responsibility equivalent to Office Assistant, Range B.

Or II

Two years of clerical experience performing duties pertinent to the specialty for which application is made.

OFFICE SERVICES SUPERVISOR II (GENERAL)

Either I

One year of experience in California state service performing duties

of a class with a level of responsibility equivalent to Office Technician.

Or II

Three years of clerical experience, at least one year of which shall have been in a responsible position performing a variety of difficult clerical work or supervising the work of a small group of employees. (Experience in the California state service applied toward the specialized one-year requirement must be performing duties of a class with a level of responsibility equivalent to Office Technician.)

OFFICE SERVICES SUPERVISOR III (GENERAL)

Either I

One year of experience in California state service performing the duties of an Office Services Supervisor II or two years of experience in the California state service performing the duties of a class with a level of responsibility equivalent to Office Technician.

Or II

Four years of clerical experience, at least two years of which shall have been in a supervisory capacity. (Experience in the California state service applied toward the specialized two-year requirement must be performing the duties of a class with a level of responsibility equivalent to Office Technician.)

ALL LEVELS:

In meeting the requirements under the II patterns, academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Modern office methods, supplies and equipment; business English and correspondence; principles and techniques of effective supervision and training; department's Affirmative Action Program objectives; a supervisor's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Perform difficult clerical work, including ability to spell correctly, use good English and make arithmetical computations; follow oral and written directions; evaluate situations accurately and take effective action; read and write English at a level required for successful job performance; make clear and comprehensive reports and keep difficult records; meet and deal tactfully with the public; apply specific laws, rules, and office policies and procedures; prepare correspondence independently utilizing a wide knowledge of vocabulary, grammar and spelling; communicate effectively; and plan, organize, direct, and supervise the work of others; effectively contribute to the department's affirmative action objectives.

OFFICE SERVICES SUPERVISOR II (GENERAL)

Knowledge of: All of the above.

Ability to: All of the above, and work independently, modify established procedures and methods to meet changing needs, and supervise the work of a medium sized group.

OFFICE SERVICES SUPERVISOR III (GENERAL)

Knowledge of: All of the above.

Ability to: All of the above, and organize and accomplish work with a high degree of independence and direct the work of a large group through subordinate supervisors.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

Education: Equivalent to completion of the twelfth grade.

OFFICE SERVICES SUPERVISOR I (GENERAL) (TYPING)

Ability to: Operate equipment required in the performance of the journey level duties of the specialty for which application is made. Examples include typewriter, dictaphone, calculating machine, or copying machine.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Office Services Supervisor I			
(General)	10/1/77	9/12/90	--
(Typing)	10/1/77	9/12/90	--
Office Services Supervisor II			
(General)	10/1/77	9/12/90	--
Office Services Supervisor III			
(General)	10/1/77	9/12/90	--

SPEC: OPERATIONS RESEARCH SPECIALIST III
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LQ01
Class Code:	5260
Established:	8/4/66
Revised:	10/21/70
Title Changed:	--

OPERATIONS RESEARCH SPECIALIST III

DEFINITION

Under general direction, to either: (1) supervise the work of persons performing varied analytical studies involving the use of operations research techniques; (2) make the more difficult and complex studies involving operations research techniques with statewide implications; or (3) direct the operations research activities of a department; to provide operations research consultive services; and to do other related work.

TYPICAL TASKS

Supervises or performs the function of constructing mathematical models as a means of predicting the effects of changes in system variables and associated constraints on the system under study; applies mathematical techniques to operational problems; provides management with factual quantitative reports on the relative merits of all reasonable courses of action; employs or directs the use of analytical or numerical procedures including the application of various branches of mathematics, such as calculus or matrix algebra, methods involving success of trials and techniques of random sampling for deriving optimum solution of models; directs or performs the function of testing model adequacy by comparing predictive results with actual results; designs solution controls to detect significant changes in system relationships and in ranges of variables; uses established operations research techniques, such as inventory models, 1inear and dynamic programming, queuing theory, replacement and renewal theory and game theory in solution of operational problems; trains and evaluates the performance of personnel; and prepares reports.

MINIMUM QUALIFICATIONS

Either I

One year of experience in the California state service performing duties of an Operations Research Specialist II.

Or II

Experience: Four years of progressively responsible technical experience in the conduct of studies involving the application of operations research techniques. At least one year of the required experience shall have been with complete responsibility for such studies. (Experience in California state service applied toward this requirement must have included at least one year performing the

duties of a class at a level of responsibility not less than that of an Operations Research Specialist II.) (A Master's Degree in Operations Research, Mathematics, Physics, Statistics, Economics, or related area may be substituted for two years of the required experience. A doctor's degree in the same disciplines may be substituted for the experience requirement.) and

Education: Graduation from college preferably with a major in mathematics or a related field.

KNOWLEDGE AND ABILITIES

Knowledge of: Mathematical modeling, inventory models, linear and dynamic programming, queuing theory, replacement and renewal theory, game theory, Monte Carlo method, deterministic and stochastic modeling systems analysis and cost effectiveness analysis procedures and techniques, digital computer computational methods, statistical methods, operations research techniques, program planning and evaluation, management problems and objectives, personnel management and supervision; department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Do unusual and difficult analytical research; direct the work of others; prepare effective reports; apply and direct the application of techniques of operations research to the solution of difficult problems; speak and write effectively; and present technical research projects in lay language for management decisions; effectively contribute to the department's affirmative action objectives.

SPEC: PERSONNEL SPECIALIST SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

PERSONNEL SPECIALIST
Series Specification
(Established March 22, 1968)

SCOPE

This series specification describes four classifications which perform specialized personnel transactions duties in State service.

Schem Code	Class Code	Class
KY45	1303	Personnel Specialist
KY36	1317	Senior Personnel Specialist
KY30	1304	Personnel Supervisor I
KY25	1314	Personnel Supervisor II

DEFINITION OF SERIES

Incumbents in these classes are distinguished from other classes by being regularly required to apply State laws and departmental and control agency rules and regulations, and bargaining unit provisions pertaining to a variety of personnel transactions in the areas of personnel record keeping, certification, payroll, and personnel documents processing and related personnel transactions functions. The predominant duties of positions in these classes require a thorough and detailed knowledge of appropriate laws, rules, regulations, and contract language pertaining to personnel transactions. Positions in this series are typically located in the headquarters or field personnel offices of a State department or major subdivision, the personnel office of a State institution, and the operating sections of the State Controller's Office.

FACTORS AFFECTING POSITION ALLOCATION

Variety and complexity of work, independence of action and decision, supervision received, supervisory responsibilities, level and amount of personal contact with customers; and the consequence of error.

DEFINITION OF LEVELS*

PERSONNEL SPECIALIST

This is a multirange level class, spanning entry through advanced journey levels. Incumbents assigned to Range A perform the least difficult transactions duties. Based upon the appropriate alternate range criteria, incumbents advance to Ranges B, C, and D. Under close supervision at the entry level, and under general supervision at the journey and advanced levels, and in accordance with established procedures, incumbents are assigned progressively more

complex and difficult transactions duties in a variety of personnel transactions areas. Experienced incumbents in this class may provide functional guidance to lower-level staff.

SENIOR PERSONNEL SPECIALIST

This is the expert journey level of the series. Under general direction, incumbents serve as the expert staff resource responsible for the most difficult and complex personnel/payroll issues. As a "staff specialist", researches critical personnel problems and recommends alternative solutions; develops and maintains specialized training programs; reviews various control agency letters, memos, and bargaining contract provisions, and develops/revises internal procedures as necessary; prepares management reports, spreadsheets, and charts; drafts correspondence; functions as a team member on personnel-related projects; are coordinators for a variety of personnel/payroll programs, e.g., FMLA; and may act in a lead role (i.e., training, workload, etc.) over lower-level staff.

PERSONNEL SUPERVISOR I

This is the first supervisory level in the series and incumbents are responsible for one or more personnel transactions programs. Under general supervision, incumbents supervise a staff of Personnel Specialists performing personnel/payroll transactions functions. There may be functional supervision of lower-level Personnel Specialists in geographically separated locations. Incumbents develop and provide training and technical assistance to internal and departmental staff.

PERSONNEL SUPERVISOR II

This is the second supervisory level in the series with full charge of all transactions functions. Through subordinate supervisors, incumbents plan, organize, and direct the work of the department's transactions program. There may be functional supervision over lower-level Personnel Specialists in geographically separated locations.

MINIMUM QUALIFICATIONS

PERSONNEL SPECIALIST

Either I

One year of experience in the California state service performing office duties at a level of responsibility equivalent to an Office Assistant, Range B.

Or II

Two years of office experience. [Academic education above the 12th grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business nature being equivalent to six months of experience.]

(Qualifying experience may be combined on a proportionate basis if

the requirements stated below include more than one pattern and are distinguished as Either I, II, or III, etc. For example, candidates possessing qualifying experience amounting to 50 percent of the required time of Pattern I, and additional experience amounting to 50 percent of the required time of Pattern II, may be admitted to an examination as meeting 100 percent of the overall experience requirement.)

SENIOR PERSONNEL SPECIALIST

One year of experience in the California state service performing the duties of a Personnel Specialist, Range D, or a Personnel Services Specialist II.

PERSONNEL SUPERVISOR I

One year of experience in the California state service performing the duties of a Personnel Specialist, Range D, Senior Personnel Specialist, or Personnel Services Supervisor I.

PERSONNEL SUPERVISOR II

One year of experience in the California state service performing the duties of a Personnel Supervisor I or a Personnel Services Supervisor II.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Current office methods, procedures, equipment, and basic math principles.

Ability to: Think logically, multitask, and apply laws, rules, regulations, and bargaining contract provisions concerning personnel transactions; independently interpret and use reference material; give and follow directions; gather data; design and prepare tables, spreadsheets, and charts; advise employees of their rights; consult with supervisors on alternative actions which they may take on various transaction situations; communicate effectively; operate a computer keyboard/terminal; establish and maintain cooperative working relations with those contacted during the course of the work; organize and prioritize work; create/draft correspondence; maintain personnel records.

SENIOR PERSONNEL SPECIALIST

Knowledge of: All of the above, and laws, rules, regulations, and bargaining contract provisions affecting personnel record keeping, personnel transactions, payroll, and certification processes used in State departments.

Ability to: Perform all of the above, and represent the department on intra/interdepartmental teams; coordinate a variety of personnel/payroll transactions; research critical transactions and

recommend alternative solutions.

PERSONNEL SUPERVISOR I AND ABOVE

Knowledge of: All of the above, and a supervisor's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment.

Ability to: Perform all of the above, and plan, organize, direct, and evaluate the work of subordinate staff; analyze work processes, evaluate suggestions, and develop and implement effective courses of action; effectively present ideas and recommendations; develop subordinate staff and assess training and developmental needs; effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

Greater emphasis is placed on supervisory and program administration skills at each higher level in this class series.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

Familiarity with automated systems.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Personnel Specialist	3/19/80	8/7/01	6/19/01
Senior Personnel Specialist	6/19/01	8/7/01	--
Personnel Supervisor I	3/22/68	8/7/01	6/19/01
Personnel Supervisor II	7/26/73	8/7/01	6/19/01

* Additional information regarding functions performed, complexity factors, and scope of responsibility is contained in a separate document titled "Allocation Guidelines."

CALIFORNIA STATE PERSONNEL BOARD
SPECIFICATION

PERSONNEL TECHNICIAN
Series Specification
(Established October 31, 1975)

SCOPE

This series specification describes three Personnel Technician classes used to do varied subsidiary personnel management work in all the major personnel management functions: selection; classification; compensation; and training.

Work assignments include performing subsidiary personnel management work involving examination preparation; assembly and routine analysis of salary data; audit of personnel programs; assisting in administration of training programs; and chairing of qualifications appraisal panels.

Schem Code	Class Code	Class
KY98	5160	Personnel Technician I
KY97	5161	Personnel Technician II (Specialist)
KY96	5139	Personnel Technician II (Supervisor)

DEFINITION OF SERIES

Persons in these classes assemble and analyze examination historical data for use by personnel analysts in the development of the examination plan; prepare examination announcements to meet analyst requirements; review applications for education and experience; select test items appropriate to the scope and level of written tests; edit and rewrite substandard items; edit items submitted by test consultants; prepare new test items; assemble complete written tests; perform item analysis; resolve item protests; prepare correspondence; chair qualifications appraisal panels; collect salary data; analyze and organize job description forms; perform technical review of personnel transactions for counties; as a member of a team, audits delegated testing and personnel programs; assists in resolving examination scheduling problems; helps conduct candidate investigations; advises on standards and procedures for abolishments and establishment of lists; prepares investigations; prepares training course announcements to meet course coordinator requirements; screens proposed participants for eligibility; explains procedures to clients; coordinates logistic and administrative facets of training courses; operates AV equipment; assists in the development and administration of training programs; investigates and makes recommendations on Board of Control claims; investigates employee grievances; reviews and takes action on temporary work week group reallocations; makes classification audits; and does other related work.

ENTRY LEVEL

Entry into this series is typically at the class of Personnel Technician I.

FACTORS AFFECTING POSITION ALLOCATIONS

Complexity of work assigned, supervision or leadership exercised and direction received.

DEFINITION OF LEVELS

PERSONNEL TECHNICIAN I

This is the training and first journeyperson level for the series. Under supervision, incumbents perform subsidiary work of average difficulty in such personnel management functions as: selection; compensation; classification;

training; and affirmative action.

PERSONNEL TECHNICIAN II (SPECIALIST)

This is the advanced journeyperson level in the series. Under direction, incumbents perform the more complex subsidiary personnel management work and may act as leadperson to a group of clerks or Personnel Technicians I engaged in subsidiary personnel management functions.

PERSONNEL TECHNICIAN II (SUPERVISOR)

This is the supervisory level in the series. Under direction, incumbents supervise a group of clerks or Personnel Technicians I engaged in subsidiary personnel management functions.

MINIMUM QUALIFICATIONS

PERSONNEL TECHNICIAN I

Either I

One year of work experience. Preference will be given to experience which has contributed to development of verbal, analytical, or writing skills.

Or II

One year of work experience which has contributed to development of verbal, analytical, and writing skills. Completion of two years of college may be substituted for the experience.

PERSONNEL TECHNICIAN II (SPECIALIST)
PERSONNEL TECHNICIAN II (SUPERVISOR)

Either I

One year of experience performing the duties of a Personnel Technician I, Range B.

Or II

Two years of work involving writing or editing original correspondence; or materials for reports or publications. Experience in California state service applied toward this requirement must be performing the duties of a class with a level of responsibility at least equivalent to Personnel Technician I, Range B.

KNOWLEDGE AND ABILITIES

PERSONNEL TECHNICIAN I

Knowledge of: Grammar, spelling, punctuation, and modern English usage.

Ability to: Interpret written material; edit written material; write effectively; analyze written and numerical data accurately, and follow oral and written instructions; clear and concise expression and oral presentations, written reports and correspondence.

PERSONNEL TECHNICIAN II (SPECIALIST)

Knowledge of: All of the above, and examining and personnel principles and practices.

Ability to: All of the above, and accept increasing responsibility for accuracy and thoroughness in performance of tasks; work effectively with others in both professional and clerical occupational groups; skill in analytical evaluations.

PERSONNEL TECHNICIAN II (SUPERVISOR)

Knowledge of: All of the above, and principles of supervision; the

department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Accuracy and thoroughness in performance of tasks and ability to work in harmony with others in both professional and clerical occupational groups.

ADDITIONAL DESIRABLE QUALIFICATION

ALL LEVELS:

Education equivalent to completion of the twelfth grade preferably with emphasis on courses in English composition and journalism.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Personnel Technician I	10/31/1975	--	--
Personnel Technician II (Specialist)	10/31/1975	05/21/1985	05/21/1985
Personnel Technician II (Supervisor)	05/21/1985	--	--

SPEC: PRINTING TRADES SPECIALIST SERIES

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

PRINTING TRADES SPECIALIST
Series Specification
(Established June 17, 1976)

Schem Code	Class Code	Class
CL60	1485	Printing Trades Specialist Trainee (General)
CL65	1487	Printing Trades Specialist I (General)
CL83	1511	Printing Trades Specialist III (General)
CL87	1519	Senior Printing Trades Specialist (General)
CL90	1473	Printing Trades Production Coordinator
CL85	1515	Printing Trades Supervisor I (General)
CL36	1516	Printing Trades Supervisor II (General)

DEFINITION OF SERIES

This consolidated series specification describes 7 classes that either (1) learn to operate, (2) perform at the journey level, (3) perform at the advanced journey level, or (4) supervise the operation of a variety of machines associated with various reproduction and duplication methods. Employees in this series select proper paper and film; select proper mixtures of chemicals and inks; process different types of masters; change and adjust lights and regulate machines according to paper speeds and nature of originals; develop and fix reproductions; compare copies with originals; order and maintain supplies; make minor adjustments to machines; oil, clean, and make minor machine repairs; trim, sort, and assemble finished material; train and give instruction; lay out, assign, coordinate, supervise, and check work; maintain discipline; review the quality and quantity of production; maintain cost and production records; prepare cost distribution and statistical records; act as consultant and advise on best methods of reproduction and duplication; perform production control and job scheduling tasks; manage contracts with private vendors; serve as liaison between clients and private vendors; devise improvements in methods and procedures; enforce safety rules; and evaluate the performance of personnel and recommend appropriate action.

DEFINITION OF LEVELS

PRINTING TRADES SPECIALIST TRAINEE (GENERAL)

This is the recruiting and developmental class for persons qualified to learn machine operations in one or more areas of a broad range of reproduction and duplication methods. Under close supervision, employees learn to apply safety rules and regulations; select proper machines for each job requirement; select proper papers and films; adjust and regulate machine speed; process different types of masters; maintain supplies; oil, clean, and make minor repairs; and sort, trim, and assemble finished materials.

PRINTING TRADES SPECIALIST I (GENERAL)

This is the first journeyperson level. Under general direction, employees at this level perform a variety of tasks and operate a variety of machinery in performing work of average difficulty in one or more areas of a broad range of reproduction and duplication methods.

PRINTING TRADES SPECIALIST III (GENERAL)

This is the second journeyperson level. Under general direction, employees at this level perform a variety of tasks and operate a variety of machinery in performing the most complex work in one or more areas of a broad range of reproduction and duplication methods.

SENIOR PRINTING TRADES SPECIALIST (GENERAL)

This is the first supervising level. Under general direction, employees at this level are either (1) in full charge of a small reproduction or duplication installation, or (2) an assistant supervisor in a medium-sized installation, or (3) a working supervisor in a medium or large installation training and directing the work of a unit of machine operators.

PRINTING TRADES PRODUCTION COORDINATOR

This is an advanced journey level, nonsupervisory specialty class for the Department of General Services, Office of Support Services, and departments with delegation to contract with outside vendors in providing printing services. Under general direction, employees at this level manage production control and job scheduling for the entire reprographics installation, administer contracts with private vendors, perform cost estimating, production monitoring, client consulting, and product inspection. Employees in this class may also be required to operate printing equipment as needed.

PRINTING TRADES SUPERVISOR I (GENERAL)

This is the second supervising level in this series. Under general direction, employees at this level are either (1) in full charge of a medium-sized reproduction or duplication installation, or (2) an assistant supervisor in a large installation.

PRINTING TRADES SUPERVISOR II (GENERAL)

This is the top supervising level in this series. Under general direction, employees at this level are in full charge of a large reproduction or duplication installation.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience and education which provide ability to perform successfully as a Printing Trades Specialist at the level and in the specialty for which application is made. (Candidate's application will be screened and those showing qualifications below the "Desirable Qualifications" which follow may be eliminated without further examination.)

DESIRABLE QUALIFICATIONS

PRINTING TRADES SPECIALIST TRAINEE (GENERAL)

Either I

One year of experience in the California state service at a level of responsibility equivalent to that obtained in the class of Office Assistant (General) or Service Assistant (Duplicating).

Or II

Completion of a formal work experience training program in machine operation, such as those operated under the Manpower Development Training Act (MDTA), the Job Corps, the Neighborhood Youth Corps, the Concentrated Employment Program (CEP), the Work Incentive Program (WIN), or similar programs operated by State, Federal, or local agencies.

PRINTING TRADES SPECIALIST I (GENERAL)

Either I

Six months' experience in the California state service performing the duties of a Printing Trades Specialist Trainee.

Or II

One year of experience operating one or a combination of machines in one or more areas of a broad range of reproduction and duplication methods.

PRINTING TRADES SPECIALIST III (GENERAL)

Either I

One year of experience in the California state service performing the duties of a Printing Trades Specialist I.

Or II

Two years of experience operating a variety of machines in one or more areas of a broad range of reproduction and duplication methods.

SENIOR PRINTING TRADES SPECIALIST (GENERAL)

Either I

One year of experience in the California state service performing the duties of a Printing Trades Specialist III.

Or II

Three years of varied experience operating a variety of machines in one or more areas of a broad range of reproduction and duplication methods.

PRINTING TRADES PRODUCTION COORDINATOR

Either I

One year of experience in the California state service performing the duties of a Printing Trades Specialist III or a Senior Printing Trades Specialist.

Or II

Two years of experience in the California state service performing the duties of a Printing Trades Specialist II.

Or III

Three years of varied experience operating a variety of machines in one or more areas of a broad range of reproduction and duplication methods.

PRINTING TRADES SUPERVISOR I (GENERAL)

Either I

One year of experience in the California state service performing the duties of a Senior Printing Trades Specialist or two years of experience performing the duties of a Printing Trades Specialist II or a Printing Trades Specialist III.

Or II

Four years of varied experience in the operation of a variety of machines, at least one year of which must have been in a supervisory capacity in one or more areas of a broad range of reproduction and duplication methods.

PRINTING TRADES SUPERVISOR II (GENERAL)

Either I

One year of experience in the California state service performing the duties of a Printing Trades Supervisor I or two years of experience performing the duties of a Senior Printing Trades Specialist.

Or II

Five years of varied experience in operation of a variety of machines, at least two years of which must have been in a supervisory capacity in one or more areas of a broad range of reproduction and duplication methods.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: The safety and health policies and procedures contained in the department's Injury and Illness Prevention Program, and knowledge of basic safe work practices.

Ability to: Carry out directions, learn rapidly the operating details of reproduction and duplication equipment, meet deadlines, maintain a clean and safe work area, and communicate at the level required for successful job performance.

PRINTING TRADES SPECIALIST I AND III (GENERAL)

Knowledge of: Reproduction and duplication processes, equipment, materials, and methods.

Ability to: Operate, adjust, and maintain equipment in good working condition; and follow directions.

PRINTING TRADES SPECIALIST IV

Knowledge of: All of the above, and reproduction processes, equipment, materials, and methods.

Ability to: All of the above, and operate, adjust, and maintain sophisticated printing and camera equipment in good working condition; and follow directions.

SENIOR PRINTING TRADES SPECIALIST (GENERAL)

Knowledge of: All of the above, and capabilities of various reproduction and duplication machines and their application to various job requests; current

development in methods, materials, and equipment; principles and techniques of personnel training and supervision; a manager's/supervisor's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment; the basic safety and health regulations contained in the California Code of Regulations, Title 8 Industrial Relations, General Industry Safety Orders; the department's safety and health policies and procedures as contained in the department's Injury and Illness Prevention Program, and the supervisor's role in maintaining an effective injury and illness prevention program.

Ability to: All of the above, and repair various reproduction and duplication equipment, supervise a small group and work well with others, analyze situations accurately and take effective action, estimate costs, maintain records, and make reports; and effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

PRINTING TRADES PRODUCTION COORDINATOR

Knowledge of: All of the above, and capabilities of various reproduction and duplication machines and their application to various job requests; current development in methods, materials, and equipment; paper, ink, and other materials required to produce finished products; principles of effective job layout and production; cost estimating and job scheduling techniques; and the department's equal opportunity policies.

Ability to: All of the above, and accurately analyze staffing and equipment capabilities and schedule work accordingly; interpret customer work orders correctly; and analyze situations accurately and take effective action, maintain records, and make reports.

PRINTING TRADES SUPERVISOR I (GENERAL)

Knowledge of: All of the above, and principles of organization and management, modern office methods, and procedures.

Ability to: All of the above, and modify reproduction and duplication equipment, coordinate the work of assistants, and supervise a medium-sized reproduction or duplication unit.

PRINTING TRADES SUPERVISOR II (GENERAL)

Knowledge of: All of the above.

Ability to: All of the above, and apply creativity in the design and modification of a complex reproduction or duplication installation, and supervise a large reproduction or duplication unit.

SPECIAL PERSONAL REQUIREMENTS

ALL LEVELS:

Aptitude for and interest in machine operation; neatness; orderliness; alertness; manual dexterity; willingness to follow a prescribed routine, stand for long periods of time, and work in noisy surroundings.

CLASS HISTORY

	Date Established	Date Revised	Title Changed
Printing Trades Specialist Trainee (General)	6/17/76	4/22/08	1/6/88
Printing Trades Specialist I (General)	6/17/76	4/22/08	1/6/88
Printing Trades Specialist III (General)	6/17/76	4/22/08	1/6/88
Senior Printing Trades Specialist (General)	6/17/76	4/22/08	1/6/88
Printing Trades Production Coordinator	5/2/84	4/22/08	5/1/87
Printing Trades Supervisor I (General)	6/17/76	4/22/08	1/6/88
Printing Trades Supervisor II (General)	6/17/76	4/22/08	1/6/88

SPEC: PROGRAMMER II
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	LM30
Class Code:	1383
Established:	9/18/80
Revised:	5/2/01
Title Changed:	--

PROGRAMMER II

DEFINITION

Under general direction, to plan and develop programs to be processed by information technology system equipment; under supervision, to perform systems analysis or systems programming (software) work; and to do other related work.

JOB CHARACTERISTICS

The class of Programmer II is the journey level programming class. Incumbents are assigned duties and responsibilities commensurate with their background and training.

Positions are permanently allocated to this class when the major portion of the functions inherent in the position do not include the more responsible, varied, and difficult assignments found in systems analysis, programming/analysis, and systems programming (software) journey level work.

TYPICAL TASKS

Studies the principles and techniques of the area of work to which assigned and applies them; designs applications programs and routines from program specifications; codes, tests, debugs, documents, and installs applications and routines; may assist in determining and analyzing the information processing needs of users, establishing the feasibility of information technology system solutions, and designing, monitoring, and implementing systems, programs, and routines; and may assist in the evaluation of proposed new or modified information technology system hardware and software and the development, installation, and measurement of systems programs.

MINIMUM QUALIFICATIONS

Unless otherwise stated, experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to other patterns to meet the total experience requirement.

Either I

One year of experience in the California state service performing

programmer duties comparable to a Programmer I (Range B).

Or II

One year of progressively responsible experience in information technology systems study, design, and programming that included responsibility on an information technology system project for analyzing operational methods and developing computer programs to meet desired results, including, under supervision, planning and developing programs performing information technology systems analysis and systems programming.

Or III

Completion of at least 60 semester units or 90 quarter units at a recognized college or university, of which 12 semester or 18 quarter units are comprised of information technology coursework.

Or IV

Successful completion of a recognized programmer apprenticeship program including programming courses with related laboratory work.

KNOWLEDGE AND ABILITIES

Knowledge of: Terms and concepts used in information systems technology.

Ability to: Reason logically and creatively; develop information technology system routines; analyze data and draw logical conclusions; communicate effectively; prepare effective reports; work cooperatively with others and gain their respect and confidence.

SPECIAL PERSONAL CHARACTERISTICS

Willingness to do detailed work requiring a high degree of mental concentration; a demonstrated capacity for development as evidenced by work history, academic attainment, or well-defined occupational or avocational interests; and willingness and ability to accept increasing responsibility.

CALIFORNIA STATE PERSONNEL BOARD
SPECIFICATION

PROGRAMMER ANALYST
Series Specification
(Established July 24, 1975)

SCOPE

Classes in this series are used to develop methods of applying information technology to the solution of problems; to develop and implement complex programs to achieve desired results; to act as leadperson or supervisor over technical personnel; and to do other related work.

Schem Code	Class Code	Class
LM20	1579	Associate Programmer Analyst (Specialist)
LM16	1581	Staff Programmer Analyst (Specialist)
LM14	1582	Staff Programmer Analyst (Supervisor)
LM12	1583	Senior Programmer Analyst (Specialist)
LM10	1584	Senior Programmer Analyst (Supervisor)

DEFINITION OF SERIES

Entry into this series is typically through the Programmer classification.

This class series is differentiated from the Programmer class in that it typically combines the most programming duties with systems analysis responsibilities and/or supervisory duties. The series is differentiated from the Information Systems Analyst series in that incumbents are not typically involved in complex feasibility studies, and they are expected to be capable of performing complex programming tasks.

FACTORS AFFECTING POSITION ALLOCATION

Variety and complexity of work assignments; scope and consequence of decisions made; independence of action and decision; and leadership or supervision exercised and direction received.

DEFINITION OF LEVELS

ASSOCIATE PROGRAMMER ANALYST (SPECIALIST)

Under general supervision, independently performs programming and analysis work, and/or acts as leader of a team of programmers, and/or participates with other programmer analysts on projects of a very complex nature or unusually broad scope.

STAFF PROGRAMMER ANALYST (SPECIALIST)

Under general supervision, acts as a project leader on complex applications, and/or on complex information technology system problems; and works independently as a technical specialist.

STAFF PROGRAMMER ANALYST (SUPERVISOR)

Under general supervision, acts as a supervisor on complex applications.

SENIOR PROGRAMMER ANALYST (SPECIALIST)

Under general direction, acts as a project leader on the most complex applications, and/or on the most complex information technology system problems; and works independently as a high-level technical specialist.

SENIOR PROGRAMMER ANALYST (SUPERVISOR)

Under general direction, acts as a supervisor on the most complex applications.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to other patterns to meet the total experience requirement.

ASSOCIATE PROGRAMMER ANALYST (SPECIALIST)

Either I

One year of experience in the California state service performing duties comparable to a Programmer II.

Or II

Eighteen months of progressively responsible experience in information technology systems study, design, and programming, which shall have included responsibility on an information technology system project for analyzing operational methods and developing computer programs to meet desired results. One year of experience in this pattern must include responsibilities under general supervision to plan and develop programs to be processed on information technology systems equipment, perform systems analysis, or systems programming work.

Or III

Equivalent to graduation from a recognized college or university with a minimum of 24 semester or 36 quarter units in information technology-related coursework. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

STAFF PROGRAMMER ANALYST (SPECIALIST)
STAFF PROGRAMMER ANALYST (SUPERVISOR)

Either I

One year of experience in the California state service performing duties comparable to an Associate Programmer Analyst (Specialist).

Or II

Two years of progressively responsible experience in information technology systems study, design, and programming, which shall have included responsibility on a project for analyzing operational methods and developing computer programs to meet desired results. One year of experience in this pattern must include independent performance of programming and analysis work, lead of a programming team, or participation as a team member on projects of a very complex nature or broad scope.

Or III

Thirty semester units or 45 quarter units of graduate work in information technology-related coursework from a recognized college or university.

SENIOR PROGRAMMER ANALYST (SPECIALIST)
SENIOR PROGRAMMER ANALYST (SUPERVISOR)

Either I

One year of experience in the California state service performing duties comparable to a Staff Programmer Analyst (Specialist) or Staff Programmer Analyst (Supervisor).

Or II

Two years of experience in the California state service performing duties comparable to an Associate Programmer Analyst (Specialist).

Or III

Thirty months of progressively responsible experience in information technology systems study, design, and programming, which shall have included responsibility on a project for analyzing operational methods and developing computer programs to meet desired results. One year of experience in this pattern must include responsibility as a project leader on complex applications, or resolution of complex information technology systems problems, and working independently as a technical specialist.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Information technology system programming, equipment, and its capabilities; principles and techniques of studying work processes for new or revised information technology system applications; principles of designing methods of processing information; technical report writing; statistical methods; principles of public administration, organization, and management; and principles of personnel management.

Ability to: Write complex programs and develop detailed program specifications; analyze information and situations, reason logically and creatively, identify problems, draw valid conclusions, and develop effective solutions; apply creative thinking in the design and development of methods of processing information with information technology systems; establish and maintain cooperative working relationships with those contacted in the course of the work; communicate effectively; and prepare effective reports.

STAFF PROGRAMMER ANALYST (SUPERVISOR)
SENIOR PROGRAMMER ANALYST (SUPERVISOR)

Knowledge of: All of the above, and principles of personnel management, supervision, and training; the department's Equal Employment Opportunity objectives; and a manager's role in the Equal Employment Opportunity and the processes available to meet equal employment objectives.

Ability to: All of the above, and supervise technical personnel; and effectively contribute to the department's equal employment objectives.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Associate Programmer Analyst (Specialist)	09/01/1975	09/03/2008	12/04/1984
Staff Programmer Analyst (Specialist)	09/01/1975	09/03/2008	12/04/1984
Staff Programmer Analyst (Supervisor)	12/04/1984	09/03/2008	--
Senior Programmer Analyst (Specialist)	09/01/1975	09/03/2008	12/04/1984
Senior Programmer Analyst (Supervisor)	12/04/1984	09/03/2008	--

SPEC: PROOFREADER

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	RH90
Class Code:	7265
Established:	7/9/31
Revised:	7/23/91
Title Changed:	--

PROOFREADER

DEFINITION

Under direction of a Composing Room Supervisor, to read and mark proof and to assist generally with proof work; and to do other related work.

TYPICAL TASKS

Reads, checks, and corrects galley and page proofs; works individually or with a copyholder and compares printer's proofs with the copy; marks on the proofs typographical errors, spelling, headings, subheadings, styles and sizes of type, and notes errors in grammar and syntax for review by a Composing Supervisor; reads and revises job proof; approves stone, offset reproductions and press proofs; and assists in marking copy for style.

MINIMUM QUALIFICATIONS

Either I

Experience: One year of experience either:

1. As a journeyperson linotype or monotype operator or compositor; or

2. Reading and marking book or magazine proofs for publication; or

3. Proofreading during apprenticeship as a compositor or typesetting machine operator; or

4. Professional editing work which must have included preparing material for printing.

Or II

Two years of experience in the California state service performing the duties of the class of Copyholder.

KNOWLEDGE AND ABILITIES

Knowledge of: English, word usage, word division, syntax, spelling, pronunciation, and punctuation; proofreading procedures, symbols, and terminology, type families, printers' point sizes and spacing.

Ability to: Detect improper word divisions, proofread, detect wrong fonts, broken or defective type, bad spacing, improper display.

SPECIAL PERSONAL CHARACTERISTICS

Clear enunciation; freedom from speech impediments; hearing adequacy within speech frequencies.

SPEC: PROPERTY APPRAISER (BOARD OF EQUALIZATION)
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

PROPERTY APPRAISER (BOARD OF EQUALIZATION)
Series Specification
(Established May 9, 1990)

SCOPE

This series specification describes eight Property Appraiser classifications used in the State Board of Equalization's Property Taxes Program.

Schem Code	Class Code	Class
KT58	5439	Assistant Property Appraiser (Board of Equalization)
KT64	5441	Assistant Property Auditor Appraiser (Board of Equalization)
KT56	5444	Associate Property Appraiser (Board of Equalization)
KT62	5448	Associate Property Auditor Appraiser (Board of Equalization)
KT54	5449	Senior Specialist Property Appraiser (Board of Equalization)
KT60	5453	Senior Specialist Property Auditor Appraiser (Board of Equalization)
KT52	5454	Supervising Property Appraiser (Board of Equalization)
KT50	5455	Principal Property Appraiser (Board of Equalization)

DEFINITION OF SERIES

The Property Appraiser audits and/or appraises and investigates property for property tax purposes; audits and evaluates county assessors' offices to ensure compliance with State laws and regulations; researches and conducts economic studies on factors affecting property values; derives property values required to prepare the annual assessment roll of railroad properties and utilities; trains, advises and assists county assessors, their staff, public officials, taxpayers and their representatives on all phases of the property taxes administration; and does other related work.

TYPICAL TASKS

Performs financial audits and/or appraisals, sample appraisals, and field investigations of all taxable property including, but not limited to, residential, agricultural, commercial, industrial, railroad, and utility properties; audits and evaluates county assessors' offices, through mandated Assessment Practices Surveys to ensure compliance with required assessment levels, property tax laws, regulations, and recommended appraisal and assessment procedures;

conducts studies of local appraisal systems, analyzes current practices, and makes recommendations for improvement; researches and develops factors and trends affecting property values; analyzes legislation and court decisions to determine program impact; consults with, advises, and assists county assessors, their staff, and other inter- and intra-governmental staff on property tax administration including valuation appraisal functions, appraisal systems, standards and methods, exemption processing, assessment roll preparation, etc.; prepares data for court cases and Board of Equalization hearings; represents the Board of Equalization's Property Taxes Department with Board of Equalization's Members, representatives of other governmental agencies, property owners, and interested groups; prepares and conducts workshops and training classes; and develops and revises appraisal procedures, manuals and assessor's handbooks.

ENTRY LEVELS

Entry into this series is typically at the Junior Property Appraiser, or Assistant Property Appraiser, or Assistant Property Auditor Appraiser.

DEFINITION OF LEVELS**

ASSISTANT PROPERTY APPRAISER (BOARD OF EQUALIZATION)
ASSISTANT PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)

This is the entry level. Under direct supervision, incumbents learn and conduct the less difficult appraisals and field investigations and/or audits* of small to medium single-location and multiuse residential, agricultural and commercial properties; review and approve the less complex property tax exemption applications; assist in the more complex investigations, and appraisals and/or audits* of all property types; assist in assessment practices surveys; research and compile data for property tax studies; participate in the development and revision of handbooks and manuals and in training of county assessors' staffs; and provide consultation and technical assistance to taxpayers, county assessors' staffs and others on less complex appraisal matters.

ASSOCIATE PROPERTY APPRAISER (BOARD OF EQUALIZATION)
ASSOCIATE PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)

This is the journey level. Under general direction, incumbents independently conduct the more difficult and complex appraisals, field investigations and/or audits* of the following property types: small utilities, medium-sized railroads, small- to medium-sized private railroad car leasing companies, medium-sized industrial and commercial properties, airlines, multi-use agricultural properties, and special use-type properties such as possessory interest properties, water companies, open-space properties, and energy generating facilities; work as team members on the most difficult appraisals or audits*; review and approve the more complex property tax exemption applications; conduct assessment practices surveys and property tax research projects of broad scope; and compile and analyze data to develop building cost trends and factors and value indicators; develop and present statewide assessor training courses; develop and revise Board of Equalization's appraisal

procedures, assessors' handbooks, and appraisal manuals; analyze new property tax legislation, rules, and regulations; provide technical advice to assessors and legislators' staff; and may act as project leader. Incumbents may also appear before the State Board of Equalization and other governmental agencies as witnesses concerning appraisals, appraisal research projects, and Board of Equalization's policies.

SENIOR SPECIALIST PROPERTY APPRAISER (BOARD OF EQUALIZATION)
SENIOR SPECIALIST PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)

This is the advanced journey or specialist level. Under general direction, incumbents independently plan, direct, and conduct the most difficult and complex appraisals, field investigations, and/or audits* of the following property types: the largest, unique and/or major industrial, railroad, private railroad car leasing companies, utility, commercial, or specialty properties and water rights; evaluate mergers and acquisitions of major railroads, utilities, and industrial companies; coordinate mandated assessment practices surveys and related appeals; design and conduct research and studies in the most difficult and complex areas concerning highly controversial and political issues; write the most technical letters, reports, and segments of appraisal manuals having major statewide policy ramifications; advise and assist the Board of Equalization's members and staff, State Legislature, county assessors, taxpayers, and others on assessment practices, valuation policies, value trends, and the impact of major legislation or judicial determinations; appear before the Board as appraisal experts and advisors to Board of Equalization members; act as an expert before the Board of Equalization and other courts in defense of audit and/or appraisal assignments; and may act in a lead capacity.

SUPERVISING PROPERTY APPRAISER (BOARD OF EQUALIZATION)

This is the first supervisory level. Incumbents in this class either: (1) supervise a field office staff of appraisers in the auditing and appraising of locally-assessed property or railroad and utility conducts audits of one or more of the property types noted above. properties; or (2) supervise a headquarters staff of appraisers and/or auditor appraisers in one or more of the following functions: performing assessment practices surveys, appraisals and audits, conducting studies of economic factors and trends, evaluating and making determinations on property tax exemptions, providing technical services involving economic studies and property tax legislation, policies and procedures; or (3) direct the statewide, legislatively mandated appraisal certification training program.

PRINCIPAL PROPERTY APPRAISER (BOARD OF EQUALIZATION)

This is the second and highest supervisory level. Through subordinate supervisors, incumbents have full managerial and supervisory responsibilities to direct and manage the activities of a staff engaged in a major statewide program of Property Taxes Administration. The primary responsibilities of the statewide programs are to either: (1) direct, advise, and instruct those local and State officials involved in the administration of the property taxes program and evaluate the performance of county assessors with

respect to their conformity to laws, Board of Equalization rules, and court rulings; or (2) locate, value, audit, assess, and allocate the taxable assets of railroads and other State-assessed utilities and prepare annual assessment rolls for the purpose of allowing local government to impose a property tax on State assesses.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience applicable to one of the following patterns may be combined, on a proportional basis, with experience applicable to another pattern to meet the total experience requirement.

ASSISTANT PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Either I

One year of experience in California state service performing property appraisal duties of a class equivalent to Junior Property Appraiser. (Applicants who are within six months of meeting this requirement will be admitted to the examination, but must satisfactorily meet this requirement before they can be considered eligible for appointment.)

Or II

Experience: Either

1. Two years of experience performing real property appraisal duties in an assessor's office; or

2. Three years of experience appraising real property. (Experience in real estate sales or transfers is not considered as qualifying experience under this requirement.)

and

Education: Equivalent to graduation from college. (Additional qualifying experience or experience in real property management, mortgage lending, title work, structural cost estimating, or real estate practice may be substituted for the required education on a year-for-year basis.)

(Experience in California state service applied toward Pattern II must include one year of experience performing the duties of a class at a level of responsibility equivalent to Junior Property Appraiser.)

ASSISTANT PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)

Either I

One year of experience in California state service performing property appraisal or auditing duties of a class equivalent to a Tax Auditor (Board of Equalization). (Applicants who are within six months of meeting this requirement will be admitted to the examination, but must satisfactorily meet this requirement before they can be considered eligible for appointment.)

Or II

Experience: Either

1. One year of experience in an assessor's office auditing and appraising personal property and fixtures of commercial or industrial firms or utilities; or

2. Two years of experience auditing records of commercial or industrial firms or utilities.

and

Either I

Education: Equivalent to graduation from college.

Or II

Completion of either:

a. A prescribed professional accounting curriculum given by a residence or correspondence school or accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced accounting, auditing, and cost accounting, and three semester units of business law.

(Additional qualifying experience may be substituted for the required education on a year-for-year basis. Substitution is not permitted for the specific college course work required under b above.)

(Experience in California state service applied toward Pattern II must include one year of experience performing the duties of a class at the level of responsibility equivalent to Junior Property Appraiser.)

ASSOCIATE PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in California state service performing property appraisal duties of a class equivalent to Assistant Property Appraiser (Board of Equalization). (Applicants who are within six months of meeting this requirement will be admitted to the examination but must satisfactorily meet the requirement before they can be considered eligible for appointment.)

Or II

Experience: Three years of professional experience appraising at least two of the following classes of property: commercial, industrial, agricultural, or residential. (Experience in real estate sales or transfers is not considered as qualifying experience under this requirement.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.) [Experience in California state service applied toward this pattern must include two years of experience performing duties in a class at a level of responsibility equivalent to Assistant Property Appraiser (Board of Equalization).]

ASSOCIATE PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in California state service performing property appraisal or auditing duties of a class equivalent to Assistant Property Auditor Appraiser (Board of Equalization). (Applicants who are within six months of meeting this requirement will be admitted to the examination but must satisfactorily meet the requirement before they can be considered eligible for appointment.)

Or II

Experience: Three years of professional experience appraising personal property and fixtures of commercial and industrial firms. (Two years of experience auditing records of commercial or industrial firms can be substituted for one of the three years.)

and

Either I

Education: Equivalent to graduation from college.

Or II

Completion of either:

a. A prescribed professional accounting curriculum given by a residence or correspondence school of accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced accounting, auditing, and cost accounting, and three semester units of business law.

(Additional qualifying experience may be substituted for the required education on a year-for-year basis. Substitution is not permitted for the specific college course work required under b above.)

[Experience in California state service applied toward Pattern II must include two years of experience performing the duties of a class at a level of responsibility equivalent to Assistant Property Auditor Appraiser (Board of Equalization).]

SENIOR SPECIALIST PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in California state service performing property appraisal duties of a class equivalent to Associate Property Appraiser (Board of Equalization). (Applicants who are within six months of meeting this requirement will be admitted to the examination but must satisfactorily meet the requirement before they can be considered eligible for appointment.)

Or II

Experience: Four years of experience appraising major and complex real property, including at least two years of experience in the independent appraisal of major commercial, industrial, and/or agricultural properties. and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.) [Experience in California state service applied toward Pattern II must include two years of experience performing duties in a class at a level of responsibility equivalent to Associate Property Appraiser (Board of Equalization).]

SENIOR SPECIALIST PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in California state service performing property appraisal and auditing duties of a class equivalent to Associate Property Auditor Appraiser (Board of Equalization). (Applicants who are within six months of meeting this requirement will be admitted to the examination but must satisfactorily meet the requirement before they can be considered eligible for appointment.)

Or II

Experience: Four years of experience in business personal property appraisal work including at least two years of experience in the independent audit and appraisal of major commercial and industrial personal properties and fixtures.

and

Either I

Education: Equivalent to graduation from college.

Or II

Completion of either:

a. A prescribed professional accounting curriculum given by a residence or correspondence school of accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced accounting, auditing, and cost accounting, and three semester units of business law.

(Additional qualifying experience may be substituted for the required education on a year-for-year basis. Substitution is not permitted for the specific college course work required under b above.)

[Experience in California state service applied toward Pattern II must include two years of experience performing the duties of a class at a level of responsibility equivalent to Associate Property Auditor Appraiser (Board of Equalization).]

SUPERVISING PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in California state service performing property appraisal duties of a class equivalent to Associate Property Appraiser (Board of Equalization), Associate Property Auditor Appraiser (Board of Equalization), or Associate Forest Property Appraiser.

Or II

Experience: Four years of increasingly responsible experience in the appraisal of major and complex real property, personal property, or timber property, at least two years of which must have been in a full journeyperson capacity. and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.) [Experience in California state service applied toward Pattern II must include two years performing duties in a class with a level of responsibility not less than that of

Associate Property Appraiser (Board of Equalization) or Associate Property Auditor Appraiser (Board of Equalization) or Associate Forest Property Appraiser.]

PRINCIPAL PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Either I

Two years of experience in the California state service performing the duties of a class equivalent to a Supervising Property Appraiser (Board of Equalization, Senior Specialist Property Appraiser (Board of Equalization), Senior Specialist Property Auditor Appraiser (Board of Equalization) or Senior Forest Property Appraiser.

Or II

Experience: Five years of experience in the appraisal of major and complex properties for tax assessment purposes, at least two years of which must have been in a full-supervisory or administrative capacity. [Experience in California state service applied toward this requirement must include one year performing the duties of a Supervising Property Appraiser (Board of Equalization), or two years performing duties in a class with a level of responsibility not less than that of Senior Specialist Property Appraiser (Board of Equalization), Senior Specialist Property Auditor Appraiser (Board of Equalization), Senior Forest Property Appraiser or Senior Petroleum and Mining Appraiser Engineer. and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: General appraisal methods, procedures, and terminology; (general accounting and auditing principles and procedures*); and real property law and common methods of describing property.

Ability to: Apply the required knowledge; conduct appraisals and/or audits of real and personal properties; analyze data and draw sound conclusions; analyze situations accurately and take effective action; prepare clear, complete, and concise reports; and communicate effectively.

ASSOCIATE PROPERTY APPRAISER (BOARD OF EQUALIZATION)
ASSOCIATE PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)
SENIOR SPECIALIST PROPERTY APPRAISER (BOARD OF EQUALIZATION)
SENIOR SPECIALIST PROPERTY AUDITOR APPRAISER (BOARD OF EQUALIZATION)

Knowledge of: All of the above, and specialized practices and procedures used in property appraisals; (and/or auditing, public utility regulations and utility accounting*); provisions of Property Tax laws administered by the State Board of Equalization; purposes, organization, and procedures of assessors' offices; departmental policies, rules and regulations; and organization of the State Board of Equalization, particularly the Property Taxes Program.

Ability to: Apply the required knowledge.

SUPERVISING PROPERTY APPRAISER (BOARD OF EQUALIZATION)
PRINCIPAL PROPERTY APPRAISER (BOARD OF EQUALIZATION)

Knowledge of: All of the above; principles, practices, and trends of public and business administration; principles and techniques of personnel management, supervision, and employer-employee relations; departmental administrative goals and policies; the State Board of Equalization's Affirmative Action Program objectives; and a supervisor's or manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Apply the required knowledge; plan, organize, and direct the work of a staff engaged in property appraisal and audit functions; develop the skills and abilities of subordinate staff; resolve complex supervisorial and/or managerial problems; and effectively contribute to the State Board of Equalization's affirmative action objectives.

* Property Auditor Appraiser (Board of Equalization) only.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Willingness to travel and work odd hours away from the office.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Assistant Property Appraiser (Board of Equalization)	5/9/90	--	--
Assistant Property Auditor Appraiser (Board of Equalization)	5/9/90	--	--
Associate Property Appraiser (Board of Equalization)	5/9/90	--	--
Associate Property Auditor Appraiser (Board of Equalization)	5/9/90	--	--
Senior Specialist Property Appraiser (Board of Equalization)	5/9/90	--	--
Senior Specialist Property Auditor Appraiser (Board of Equalization)	5/9/90	--	--
Supervising Property Appraiser (Board of Equalization)	5/9/90	--	--
Principal Property Appraiser (Board of Equalization)	5/9/90	--	--

* Only the Property Auditor Appraiser (Board of Equalization) conducts audits of one or more of the property types noted above.

** Additional information regarding functions performed, complexity

factors and scope of responsibility is contained in a separate document titled "Allocation Guidelines".

* Only the Property Auditor Appraiser (Board of Equalization)

SPEC: PROPERTY CONTROLLER II
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	CO70
Class Code:	1549
Established:	7/14/45
Revised:	12/3/85
Title Changed:	12/3/85

PROPERTY CONTROLLER II

DEFINITION

Under direction, to have responsibility for property control in the larger State departments, institutions, districts, or geographical areas; and to do other related work.

DISTINGUISHING CHARACTERISTICS

Property Controllers II are responsible for the operation of a complex property control system with centralized or moderately dispersed property. This class is normally used in departments, institutions, or districts having an approximate minimum of 6,000 property items and an annual total of approximately 1,000 property acquisitions, transfers, and surveys. Property Controllers II usually supervise a small clerical staff but may work independently, depending upon the size and complexity of the property accounting function. Large systems having widely dispersed property are headed by Property Inspectors.

TYPICAL TASKS

Establishes and supervises the maintenance of property accounts and records of location of property; is responsible for recording the receipt of new property and for the proper marking of property; releases property to authorized units and individuals; informs employees receiving property of their responsibility and liability for it; issues directives concerning the care and movement of property; receives requests for and recommends transfers of property; makes or supervises the making of periodic inventories and reconciles property records; prepares annual statements of property inventory showing the cost of property by classification; determines the condition and recommends proper disposition of property requiring repair, salvage, or disposal; may conduct sales of property being disposed of; may maintain control records for keys; prepares data to justify replacement or additional equipment in the equipment budget; develops improvements in property accounting procedures in accordance with departmental directives and the State system of property accounting; instructs others in the methods of property accounting; keeps records; dictates correspondence; and prepares reports.

MINIMUM QUALIFICATIONS

Either I

One year of experience in the California state service performing the duties of Property Controller I.

Or II

Two years of experience inventorying and maintaining property and equipment control records in the California state service. (Experience below the level of Office Assistant II is not considered qualifying.)

Or III

Three years of experience inventorying and maintaining control records for a wide variety of property and equipment or expendable storekeeping items.

KNOWLEDGE AND ABILITIES

Knowledge of: Methods and practices used in recording, inspecting, maintaining, issuing, taking and recording inventory, accounting for and disposing of property; types of property used in the various State departments, institutions, or districts; property records section of the California State Administrative Manual; office methods and procedures; principles of effective supervision and training. Skill in making arithmetical calculations.

Ability to: Read and write English at a level required for successful job performance; supervise the work of others; inspect, determine condition of, and recommend proper disposition of property; take an accurate inventory of scattered and diverse property; reconcile inventories with control accounts; analyze situations accurately and take effective action; speak and write effectively; instill in others an awareness of their responsibility for State property maintenance and accounting.

ADDITIONAL DESIRABLE QUALIFICATION

Education equivalent to completion of the twelfth grade.

SPEC: RESEARCH ANALYST (VARIOUS CLASSES)
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

RESEARCH ANALYST (VARIOUS CLASSES)
Consolidated Series Specification
(Established April 1, 1976)

Schem Code	Class Code	Class
LQ20	5729	Research Analyst I (General)
LQ23	5791	Research Analyst I (Economics)
LQ24	5807	Research Analyst I (Demography)
LQ22	5859	Research Analyst I (Social/Behavioral)
LQ25	7416	Research Analyst I (Geographic Information Systems)
LQ10	5731	Research Analyst II (General)
LQ12	5732	Research Analyst II (Social/Behavioral)
LQ13	5792	Research Analyst II (Economics)
LQ14	5809	Research Analyst II (Demography)
LQ15	7417	Research Analyst II (Geographic Information Systems)

DEFINITION OF SERIES

This consolidated series specification describes classes (four salary ranges) in which employees, under supervision, perform technical research and statistical work in one or more of a wide variety of research fields, including social, financial, resource, economic, statistical, demographic, geographic, justice and related areas. The term research as applied to this class series, is defined as systematic, critical, intensive investigation directed toward either a more comprehensive knowledge of the subject or for use in the resolution of program related issues. This does not include library research solely to gather information; preparing and designing plans, projects and specifications for transportation or construction projects; or scientific research work in laboratories. Employees in this series gather, compile, edit, and interpret quantitative data in these enumerated areas or they develop, implement, and monitor systems and procedures to assemble and structure the necessary data. The research work differs from general staff analysis in that:

The work involves varied degrees of application of the research methodology including problem exploration and definition, planning and designing the approach and sequence of steps, collection of data, interpretation of findings, and documentation and reporting of findings in a structured, professional format.

Entry into this series typically comes at the entry level from college recruitment sources or through related State classifications at a lower level. Normally each professional discipline area will have its own separate class(es) which are designated by use of one or more of the specified levels followed by a parenthetical designation of the program specialty. Each special program

incorporated into this specification will utilize only the class(es) that appropriately describe the type and level of work performed and the duties and responsibilities assigned to positions which are comparable to the appropriate level(s) described in this series specification.

FACTORS AFFECTING POSITION ALLOCATION

Overall scope and complexity of the research or statistical program and the relative complexity and professional requirements of the specific research or statistical projects. The number, level and function of other positions and the relative scope and complexity of these other activities in the department are compelling considerations also. Other factors include independence of action, level of decision making, degree or originality of techniques employed; degree of research methodology used; uniqueness of activities, impact and ultimate usage of conclusions and recommendations. A composite evaluation of all of these differentiating factors will be employed in making determinations on all allocations.

DEFINITION OF LEVELS

RESEARCH ANALYST I (GENERAL)

This is an entry, recruiting and developmental class for persons qualified to perform basic technical research and statistical work in one or more areas of a broad range of research fields as a background for advancement in State service. Employees are assigned duties and responsibilities commensurate with their background and training. Positions may be permanently assigned to this level, Research Analyst I, when the major functions of the position do not include the more responsible, varied, independent and difficult assignments found in the full journeyperson level of Research Analyst II (Various Classes). Work at this level is characterized by a reliance on proven techniques and methodologies and usually involves assignments in areas where a comparable body of knowledge and experimentation exists.

RESEARCH ANALYST II (GENERAL)

This is the full journey level class. Under general direction, employees at this level perform a variety of tasks including the more independent, responsible, varied and complex technical research and statistical work in a variety of fields; they may provide consultative advice to various governmental entities and agencies, and may act as a leadperson. Work at this level is often characterized by independent development and employment of research methodology and techniques; and the designing and implementation of research projects. Usually involves investigation into areas where precedents are lacking or where only a sparse body of knowledge or experience in the area exist.

Incumbents often have lead responsibilities, work on multidisciplinary teams or have primary responsibility for a major project or activity.

SCOPE OF RESEARCH ANALYST CLASSES

GENERAL

Incumbents in this parenthetical are distinguished from other Research Analysts by being required to perform any combination of the general research and statistical duties listed in the Definition of Series. The depth of knowledge required in any one discipline are not as pronounced as found in other areas. This parenthetical is most appropriate for those settings requiring a broad understanding of basic research and statistical methods and ability to synthesize data from a variety of disciplines. The general classes require an overall comprehension of research methodology and statistical procedures.

SOCIAL/BEHAVIORAL

Incumbents in this parenthetical speciality are distinguished from other Research Analysts by being required to perform research and statistical studies involving the evaluation and research of individual and social aspects of human behavior. The study conclusions are utilized for test construction, program planning, and implementation in such areas as traffic accidents, driver behavior, health care, vocational rehabilitation, delinquency, and criminal behavior.

DEMOGRAPHY

Incumbents in this parenthetical specialty are distinguished from other Research Analysts by being required to perform research and statistical studies involving the assessment of demographic patterns such as the composition, magnitude of the population and future population trends. The study conclusions are utilized in estimation of current and future population for the purpose of revenue estimating, tax allocation and limitation, State budget preparation, energy and environmental planning and providing for future needs for education, transportation, water, air quality and special programs and facilities for the disadvantaged.

ECONOMICS

Incumbents in this parenthetical specialty are distinguished from other Research Analysts by being required to perform research and statistical studies involving assessment of: the cost, supply, demand, utilization, and trends of a variety of resources; financial and economic trends; and program planning and funding. The studies' conclusions involve: analyses of such resources as energy, agricultural products, water, utilities, air, and their impact on the environment; and, planning a gamut of financial and economic activities.

GEOGRAPHIC INFORMATION SYSTEMS

Incumbents in this parenthetical are distinguished from other Research Analysts by being able to perform research and statistical studies involving various types of digital spatial data and the

techniques and methodologies associated with geographic information systems. The studies, objectives and conclusions may be based on spatial analysis of: natural resource management, land use and transportation planning, emergency response planning and health assessments.

MINIMUM QUALIFICATIONS

RESEARCH ANALYST I

GENERAL

Either I

Education: Equivalent to graduation from college with any major, but with extensive course work in an area appropriate to the parenthetical specialty, such as economics, psychology, sociology, demography, geography, anthropology, statistics, or a related research-oriented field. (See individual parentheticals.) This must include or be supplemented by at least one course in statistical methods.

(Registration as a senior in a recognized institution of higher education will admit applicants to the examination but they must produce evidence of graduation before they can be considered eligible for appointment.) (Work experience in the California state service performing technical research- related duties appropriate to the parenthetical specialty may be substituted for the required education on a year-for-year basis.)

Or II

Six months of experience performing research-related duties in the class of Management Services Technician, Range B, and twelve semester or eighteen quarter units of college courses in economics, psychology, sociology, demography, geography, or a subject closely related to the work. or

Twelve months of technical research-related duties in a class equivalent to that of Crime Studies Technician I.

SOCIAL/BEHAVIORAL

Demonstrated achievement as evidenced through experience and education which provide ability to perform successfully (under supervision) evaluation and research of psychological and sociological behavior factors; and all of the requirements specified in the Research Analyst I (General).

DEMOGRAPHY

Demonstrated achievement as evidenced through education and experience which provides ability to perform successfully (under supervision) evaluation and research of demographic related topics; and all of the requirements specified in the Research Analyst (General).

ECONOMICS

Demonstrated achievement as evidenced through experience or education which provide ability to perform successfully (under supervision) evaluation and research of economic trends and all of the requirements specified in the Research Analyst I (General).

GEOGRAPHIC INFORMATION SYSTEMS

Demonstrated achievement as evidenced through experience or education which provides ability to perform successfully (under supervision) evaluation and research of geographic data and spatial analysis; and all of the requirements specified in the Research Analyst I (General).

RESEARCH ANALYST II

GENERAL

Either I

Experience: At least one year of pertinent research experience appropriate to the parenthetical specialty performing the duties of a class with a level of responsibility equivalent to Research Analyst I, Range C. (Applicants who have completed six months of service performing the duties as specified above will be admitted to the examination but they must satisfactorily complete one year of this experience before they can be eligible for appointment.)

Or II

Experience: Three years of progressively responsible technical experience in a research program appropriate to the parenthetical specialty including two years above the trainee level engaged in the collection, compilation, analysis and interpretation of data. (Experience in the California state service applied toward this pattern must include at least one year of research experience appropriate to the parenthetical specialty performing the duties of a class with a level of responsibility equivalent to Research Analyst I, Range C.) (A Master's Degree in Economics, Psychology, Sociology, Demography, Geography, or a related research-oriented field may be substituted for one year of the required experience. A doctoral degree in the same areas may be substituted for two years of the required experience.) and

Education: Equivalent to graduation from college with any major but with extensive course work in an area appropriate to the parenthetical specialty, such as economics, psychology, sociology, demography, geography, anthropology, statistics, or a related research-oriented field.

This must include or be supplemented by at least one course in statistical methods.

SOCIAL/BEHAVIORAL

Demonstrated achievement as evidenced through experience and education which provide ability to independently and successfully perform evaluation and research of psychological and sociological behavior factors; and all of the requirements specified in the Research Analyst II (General).

The pertinent experience specified in the Research Analyst II (General) means one year of experience equivalent to Research Analyst I (Social/Behavioral), Range C.

DEMOGRAPHY

Demonstrated achievement as evidenced through experience and education which provide ability to independently and successfully perform evaluation and research of demographic related topics; and all of the requirements specified in the Research Analyst II (General).

The pertinent experience specified in the Research Analyst II (General) means one year of experience equivalent to Research Analyst I (Demography), Range C.

ECONOMICS

Demonstrated achievement as evidenced through experience and education which provide ability to independently and successfully perform evaluation and research of economic trends; and all of the requirements specified in the Research Analyst II (General).

The pertinent experience specified in the Research Analyst II (General) means one year of experience equivalent to Research Analyst I (Economics), Range C.

GEOGRAPHIC INFORMATION SYSTEMS

Demonstrated achievement as evidenced through experience and education which provides ability to independently and successfully perform evaluation and research of geographic data and spatial analysis; and all of the requirements specified in the Research Analyst II (General).

The pertinent experience specified in the Research Analyst II (General) means one year of experience equivalent to Research Analyst I (GIS), Range C.

KNOWLEDGE AND ABILITIES

RESEARCH ANALYST I

GENERAL

Knowledge of: Research methods and techniques including planning of studies and investigations, statistical procedures, general principles, concepts and terminology used in research.

Ability to: Gather, compile, analyze and interpret data; prepare research and statistical reports; analyze written and numerical data regarding general governmental problems; speak and write effectively; reason logically and creatively and use a variety of analytical techniques to resolve or provide information regarding complex governmental and managerial problems; develop and evaluate alternatives; consult with and advise administrators or other

interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of others.

SOCIAL/BEHAVIORAL

Knowledge of: Principles and concepts of psychological and sociological behavioral theory as applied in a research and statistical setting; and all of the requirements specified in the Research Analyst I (General).

Ability to: Conduct research and evaluate behavior (under supervision).

DEMOGRAPHY

Knowledge of: Principles and concepts of demography as applied in a research and statistical setting; and all of the requirements specified in the Research Analyst I (General).

Ability to: Assess demographic patterns (under supervision).

ECONOMICS

Knowledge of: Principles and concepts of economics, resources, and finance as applied in a research and statistical setting; and all of the requirements specified in Research Analyst I (General).

GEOGRAPHIC INFORMATION SYSTEMS

Knowledge of: Principles and concepts of geography or cartography that relate to spatial analysis and all of the requirements as specified under Research Analyst I (General).

Ability to: Conduct research and perform spatial analysis using mapped and tabular information (under supervision).

RESEARCH ANALYST II

GENERAL

The knowledge and abilities for the Research Analyst I plus understanding and commitment to effectively carry out State and departmental equal employment opportunity and affirmative action policies; designing and implementing research-related projects; departmental policies and procedures.

SOCIAL/BEHAVIORAL

Knowledge of: Principles and concepts of psychological and sociological behavioral theory; techniques and methodologies for measuring psychological and sociological dimensions; social problems of governmental concern; experimental design procedures and all of the requirements specified in the Research Analyst II (General).

Ability to: Adapt and apply formal research methods and principles to research problems of an applied practical nature; research and evaluate behavior, design and validate studies.

DEMOGRAPHY

Knowledge of: Principles and concepts of demographic research; techniques of population projection; trend analysis procedures; and familiarity with United States Census Bureau practices, data and publications; and all of the requirements specified in the Research Analyst II (General).

Ability to: Adapt and apply formal research methods and principles of research problems of an applied practical nature; independently assess demographic patterns.

ECONOMICS

Knowledge of: Principles and concepts of economics, public agency finance, resources, economic research methodology; and econometrics as applied in a research setting; and all of the requirements specified in the Research Analyst II (General).

Ability to: Adopt and apply formal research methods and principles to research problems of an applied practical nature.

GEOGRAPHIC INFORMATION SYSTEMS

Knowledge of: Principles and concepts of geography, cartography, and computer mapping; techniques of spatial analysis that involve map overlays and proximity analysis; familiarity with various map products provided by the U.S. Geological Survey, including digital formats; familiarity with map projections and coordinate systems; and all of the requirements specified in the Research Analyst II (General).

Ability to: Adapt and perform spatial analysis techniques and methods to complex problems involving mapped information.

DESIRABLE QUALIFICATIONS

SOCIAL/BEHAVIORAL

College level courses equivalent to six semester hours of statistics, six semester hours of research techniques, and six semester hours of psychological-related or sociological-related courses.

DEMOGRAPHY

College level courses equivalent to six semester hours of demographic studies, and six semester hours of statistics.

ECONOMICS

College level courses equivalent to six semester hours of advanced economics, six semester hours of public finance, and six semester hours of statistics.

GEOGRAPHIC INFORMATION SYSTEMS

College level courses equivalent to six semester hours of geographic analysis techniques and six semester hours of data base management techniques; which may include computer cartography, remote sensing, or spatial analysis of statistical data.

SPECIAL PERSONAL QUALIFICATIONS

RESEARCH ANALYST I

ALL PARENTHETICALS:

Willingness to do routine or detailed work in order to learn the practical application of research principles; demonstrated capacity for development as evidenced by work history, academic attainment, participation in school or relevant nonschool activities, or by well-defined occupational interests; willingness and ability to accept increasing responsibility; flexibility; ability to work effectively with others.

RESEARCH ANALYST II

ALL PARENTHETICALS:

Ability to analyze problems accurately, develop appropriate solutions, and recommend effective optional courses of action; identify improvements and to originate and develop new solutions which depart from traditional and existing patterns; assume increased responsibility; flexibility; work effectively with others.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Research Analyst I (General)	4/1/76	12/19/79	--
Research Analyst I (Economics)	9/7/76	12/19/79	12/19/79
Research Analyst I (Demography)	7/21/77	12/19/79	--
Research Analyst I (Social/ Behavorial)	11/30/77	--	--
Research Analyst I (Geographic Information Systems)	7/24/90	--	--
Research Analyst II (General)	4/1/76	12/19/79	--
Research Analyst II (Social/ Behavorial)	4/1/76	12/19/79	--
Research Analyst II (Economics)	9/7/76	12/19/79	12/19/79
Research Analyst II (Demography)	7/21/77	12/19/79	12/19/79
Research Analyst II (Geographic Information Systems)	7/24/90	--	--

SPEC: RESEARCH MANAGER (VARIOUS CLASSES)
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

RESEARCH MANAGER (VARIOUS CLASSES)
Series Specification
(Established April 1, 1976)

Schem Code	Class Code	Class
LQ50	5734	Research Manager I (General)
LQ54	5853	Research Manager I (Demography)
LQ53	5793	Research Manager I (Economics)
LQ55	7421	Research Manager I (Geographic Information Systems)
LQ52	5735	Research Manager I (Social/Behavioral)
LQ40	5737	Research Manager II (General)
LQ44	5854	Research Manager II (Demography)
LQ43	5794	Research Manager II (Economics)
LQ45	7422	Research Manager II (Geographic Information Systems)
LQ42	5738	Research Manager II (Social/Behavioral)
LQ30	5740	Research Manager III (General)
LQ27	6401	Research Manager III (Demography)
LQ35	7423	Research Manager III (Geographic Information Systems)
LQ32	5741	Research Manager III (Social/Behavioral)

DEFINITION OF SERIES

Research Managers are responsible for leadership of a distinct research or statistical segment of a department. They plan operations, develop staffing requirements, organize and direct the work of a group of employees, and evaluate their work. They hire and separate employees. Research Managers propose and manage budgets for their operations. They set goals, manage resources to meet these goals, and report the results to their management. They direct their operations within the context of the total department and coordinate their work and cooperate with the other parts of the department and with other organizations involved to meet overall departmental goals.

The three levels in this series cover a range from the working supervisor to the highest non-C.E.A. level. Employees may function as generalists or specialist managers.

The basic series in this grouping is Research Manager I, II, III (General). Classes reflecting various occupational specialties are activated as needed by use of the general specification and an appropriate parenthetical designation in the title, such as Research Manager I, II (Economics); Research Manager I, II, III (Demography); or Research Manager I, II, III (Social/Behavioral); or Research Manager I, II, III (Geographic Information Systems). Emphasis is on management skills, with a background in a specific occupational area required where this is essential to informed decision making. The term research as applied to this class series, is defined as

systematic, critical, intensive investigation directed toward either a more comprehensive knowledge of the subject or for use in the resolution of program-related issues. This does not include library research solely to gather information; preparing and designing plans, projects, and specifications for transportation or construction projects; or scientific research work in laboratories.

ENTRY LEVELS

Entry into this series is typically through the journey level (Research Analyst II) in the Research Analyst class series.

FACTORS AFFECTING POSITION ALLOCATION

Level, variety, and complexity of work; independence of action and decision; supervision received; and degree of supervisory responsibilities serve as differentiating factors between individual classes. The absolute size of staff (indicated in relative terms such as "large" or "very large") is not controlling in determining a supervisor's position allocation if supervision of staff is accompanied by responsibility for consultation to top staff and responsibility for managing the work of the staff in a wide variety of broad research activities. While size of staff should normally reflect activity, scope of program, and the extent to which the head of the activity is a program manager rather than a project worker, size of staff should not be considered an absolute criterion.

The other factors which enter into level determination (particularly in borderline allocations) insofar as they directly affect the Manager's operation, are:

1. Size of research function and number of technical employees supervised.

2. Complexity of research function.

3. Sensitivity of assignment.

4. Level and location of executive to whom the Research Manager reports.

5. Responsibility for decisions made (impact of research projects on the department).

DEFINITION OF LEVELS

RESEARCH MANAGER I (VARIOUS CLASSES)

This is a working supervisor level responsible for a small group of analysts or equivalent employees performing journey level work. A Manager I personally performs the most difficult or sensitive work of the group.

RESEARCH MANAGER II (VARIOUS CLASSES)

This is the first full supervisory level over analytical research and administrative work. In most settings, managers at this level are in

charge of a well-established and fully developed research function in a moderate to large department or an equivalent segment in a larger department. Managers II spend much of their time in supervision and management activities rather than personally performing work which can be done by a journeyperson or research program specialist.

RESEARCH MANAGER III (VARIOUS CLASSES)

This is the second full supervisory level responsible for a large and varied research function in one of the larger departments. Supervision is typically given through Managers I and II or equivalent subordinate supervisory levels.

SCOPE OF RESEARCH MANAGER CLASSES

GENERAL

Incumbents in this parenthetical are distinguished from other Research Managers by being required to perform any combination of general management and research duties listed in the Definition of Series. The depth of knowledge required in any one discipline are not as pronounced as found in other areas. This parenthetical is most appropriate for those settings requiring a broad understanding of research or statistical methods, ability to manage analysts, and ability to synthesize data from a variety of disciplines. The general classes require an overall comprehension of management, research methodology, and statistical procedures.

DEMOGRAPHY

Incumbents in this parenthetical specialty are distinguished from other Research Managers by being required to manage and direct research and statistical studies involving the assessment of demographic patterns such as the composition and magnitude of the population, and future population trends. The study conclusions are utilized in estimation of current and future population for the purposes of revenue estimating, tax allocation and limitation, State budget preparation, energy and environmental planning, and providing for future needs for education, transportation, water, air quality and special programs and facilities for the disadvantaged.

ECONOMICS

Incumbents in this parenthetical specialty are distinguished from other Research Managers by being required to perform, manage and direct research and statistical studies involving assessment of: the cost, supply, demand, utilization, and trends of a variety of resources, and for program planning and funding purposes. The study conclusions involve analyses of such resources as energy, agricultural products, water, utilities, air, and their impact on the environment; economic and/or labor market trends, as well as program and budget planning.

GEOGRAPHIC INFORMATION SYSTEMS
Incumbents in this parenthetical specialty are distinguished from

other Research Managers by being required to perform, manage, and direct research and statistical studies involving various types of digital spatial data and methodologies associated with geographic information systems. The objectives and conclusions of the studies involve analyses for various purposes, including natural resources management, land use and transportation planning, emergency response planning, and health assessments.

SOCIAL/BEHAVIORAL

Incumbents in this parenthetical specialty are distinguished from other Research Managers by being required to perform, manage, and direct research and statistical studies involving the research and evaluation of individual or social aspects of human behavior. The study conclusions are utilized for test development, program planning and implementation in such areas as traffic accidents, driver behavior, health care, vocational rehabilitation, delinquency, and criminal behavior.

MINIMUM QUALIFICATIONS

RESEARCH MANAGER I (GENERAL)

Experience and education which provides ability to perform successfully as a Research Manager at the level for which application is made.

and

Either I

One year in the California state service performing pertinent research-related duties in a class with a level of responsibility equivalent to that of Research Analyst II.

Or II

Experience: Three years of pertinent professional research experience above the trainee level which must have included responsibility for the determination of research design and methodology for a complete research project. (A Doctorate Degree in Economics, Psychology, Sociology, Geography, or a related research-oriented field may be substituted for two years of the required experience or a master's degree in a similar field to that described for the doctoral degree, may be substituted for one year of the required experience.) (Research experience in the California state service applied toward this pattern must include at least one year performing the duties in a class with a level of responsibility equivalent to Research Analyst II.) and

Education: Graduation from college, with any major but with extensive course work in economics, psychology, sociology, geography, or a related research-oriented field. This must include or be supplemented by at least six semester hours in statistical methods.

RESEARCH MANAGER II (GENERAL)

Experience and education which provides ability to perform successfully as a Research Manager at the level for which application is made.

and

Either I

One year in the California state service performing pertinent research-related duties in a class with a level of responsibility equivalent to that of Research Manager I.

Or II

Experience: Four years of pertinent professional research experience above the trainee level which must have included responsibility for the determination of research design and methodology of a complete research project. (A Doctorate Degree in Economics, Psychology, Sociology, Geography, or a related research-oriented field may be substituted for two years of the required experience or a master's degree may be substituted in a similar field to that described for the doctoral degree, for one year of the required experience.) (Research experience in the California state service applied toward this pattern must include at least one year of experience in a class with a level of responsibility equivalent to Research Manager I to two years equivalent to Research Analyst II.) and

Education: Graduation from college with any major but with extensive course work in economics, psychology, sociology, geography, or a related research-oriented field. This must include or be supplemented by at least six semester hours in statistical methods.

RESEARCH MANAGER III (GENERAL)

Experience and education which provides ability to perform successfully as a Research Manager at the level for which application is made. (Those applications showing qualifications below the minimum listed below may be eliminated without further examination.)

and

Either I

One year in the California state service performing pertinent research-related duties in a class with a level of responsibility equivalent to that of Research Manager II.

Or II

Experience: Five years of pertinent professional research experience above the trainee level which must have included responsibility for the determination of research design and method for a complete research project. (A Doctorate Degree in Economics, Psychology, Sociology, Geography, or a related research-oriented field may be substituted for two years of the required experience or a master's degree in a similar field to that described for the doctoral degree, may be substituted for one year of the required experience.) (Research experience in the California state service applied toward this pattern must include at least one year of experience in a class with a level of responsibility equivalent to Research Manager II.) and

Education: Graduation from college with any major but with extensive course work in economics, psychology, sociology, geography, or a related research-oriented field. This must include or be supplemented by at least six semester hours in statistical methods.

RESEARCH MANAGER I (DEMOGRAPHY)

Experience and education which provides the ability to manage and perform research and statistical studies in the assessment of demographic patterns; and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager I (General) means one year of experience equivalent to Research Analyst II (Demography).

RESEARCH MANAGER II (DEMOGRAPHY)

Experience and education which provides the ability to manage and perform research and statistical studies in the assessment of demographic patterns; and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager II (General) means one year of experience equivalent to Research Manager I (Demography) or two years equivalent to Research Analyst II (Demography).

RESEARCH MANAGER III (DEMOGRAPHY)

Experience and education which provides the ability to manage and perform research and statistical studies in the assessment of demographic patterns; and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager III (General) means one year of experience equivalent to Research Manager II (Demography).

RESEARCH MANAGER I (ECONOMICS)

Experience and education which provides the ability to successfully manage and perform evaluation and research of economic resources and finances; and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager I (General) means one year of experience equivalent to Research Analyst II (Economics).

RESEARCH MANAGER II (ECONOMICS)

Experience and education which provides the ability to successfully manage and perform evaluation and research of economic resources and finances and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager II (General) means one year of experience equivalent to Research Manager I (Economics) or two years of experience equivalent to Research Analyst II (Economics).

RESEARCH MANAGER I (GEOGRAPHIC INFORMATION SYSTEMS)

Experience and education which provides the ability to successfully direct and perform evaluation and research of spatially referenced

geographic data; and all of the requirements specified in Research Manager (General).

The pertinent experience specified in the Research Manager I (General) means one year of experience equivalent to Research Analyst II (Geographic Information Systems).

RESEARCH MANAGER II (GEOGRAPHIC INFORMATION SYSTEMS)

Experience and education which provides the ability to successfully direct and perform evaluation and research of spatially referenced geographic data; and all of the requirements specified in Research Manager (General).

The pertinent experience specified in the Research Manager II (General) means one year of experience equivalent to Research Manager I (Geographic Information Systems) or two years of experience equivalent to Research Analyst II (Geographic Information Systems).

RESEARCH MANAGER III (GEOGRAPHIC INFORMATION SYSTEMS)

Experience and education which provides the ability to successfully manage and perform evaluation and research of spatially referenced geographic data; and all of the requirements specified in Research Manager (General).

The pertinent experience specified in the Research Manager III (General) means one year of experience equivalent to Research Manager II (Geographic Information Systems).

RESEARCH MANAGER I (SOCIAL/BEHAVIORAL)

Experience and education which provides the ability to successfully manage and perform evaluation and research of psychological and sociological behavior factors; and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager I (General) means one year of experience equivalent to Research Analyst II (Social/Behavioral).

RESEARCH MANAGER II (SOCIAL/BEHAVIORAL)

Experience and education which provides the ability to successfully manage and perform evaluation and research of psychological and sociological behavior factors; and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager II (General) means one year of experience equivalent to Research Manger I (Social/Behavioral) or two years of experience equivalent to Research Analyst II (Social/Behavioral).

RESEARCH MANAGER III (SOCIAL/BEHAVIORAL)

Experience and education which provides the ability to successfully manage and perform evaluation and research of psychological and sociological behavior factors; and all of the requirements specified in the Research Manager (General).

The pertinent experience specified in the Research Manager III (General) means one year of experience equivalent to Research Manager II (Social/Behavioral).

KNOWLEDGE AND ABILITIES

ALL LEVELS (GENERAL):

Knowledge of: Research methods and techniques; public administration, including management and supportive staff services such as budget, personnel, program planning and evaluation, or related areas; employee supervision, development, and training; program management; governmental functions and organization at the State and local level as they affect departmental research functions; department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Plan, organize and manage a research function; reason logically and creatively and use a variety of analytical and research techniques to solve complex problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subjects; gain and maintain the confidence and cooperation of others; review and edit written reports; use interdisciplinary teams effectively in the conduct of studies; manage a complex program; establish and maintain project priorities; and develop and effectively use all available resources; effectively contribute to the department's affirmative action objectives.

ALL LEVELS (DEMOGRAPHY):

Knowledge of: Principles and concepts of demography as applied in a research and statistical setting; application and interpretation of statistical techniques to demographic data; population projections; United States Census Bureau practices data and publications; all of the requirements specified in the Research Manager (General); department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Manage, research and evaluate demographic studies; effectively contribute to the department's affirmative action objectives.

ALL LEVELS (ECONOMICS):

Knowledge of: Principles and concepts of economics, public agency finance and resources, economic research methodology; econometrics as applied in a research setting; all of the requirements specified in the Research Manager (General); department's Affirmative Action

Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.
Ability to: Manage and perform research studies as related to economics; econometric modeling; effectively contribute to the department's affirmative action objectives.

ALL LEVELS (GEOGRAPHIC INFORMATION SYSTEMS):

Knowledge of: Principles and concepts of geography, cartography, computer mapping, and spatial analysis techniques including map overlays, spatial statistics, and proximity analysis; familiarity with various map products provided by the U.S. Geological Survey, including digital formats; familiarity with map projections and coordinate systems; all of the requirements specified in the Research Manager (General); department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Manage, research, and evaluate geographic studies, involving digital spatial analysis techniques such as computer mapping and geographic information systems; effectively contribute to the department's affirmative action objectives.

ALL LEVELS (SOCIAL/BEHAVIORAL):

Knowledge of: Principles and concepts of psychological or sociological behavioral theory; techniques and methodologies for measuring psychological or sociological dimensions; social problems of governmental concern; experimental design procedures and all of the requirements specified in the Research Manager (General); department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Manage research and evaluate behavior, design and validate studies; effectively contribute to the department's affirmative action objectives.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS (DEMOGRAPHY):

College level courses equivalent to six semester hours of advanced statistics; six semester units of research techniques; and six semester hours of demographic studies.

ALL LEVELS (ECONOMICS):

College level courses equivalent to six semester hours of advanced economics and six semester hours of public finance.

ALL LEVELS (GEOGRAPHIC INFORMATION SYSTEMS):

College level courses equivalent to six semester hours of geographic

analysis techniques and six semester hours of data base management techniques; which may include computer cartography, remote sensing, or spatial analysis of statistical data.

ALL LEVELS (SOCIAL/BEHAVIORAL):

College level courses equivalent to six semester hours of advanced statis-tics; six semester units of research techniques; and six semester hours of psychological-related or sociological-related courses.

SPECIAL PERSONAL REQUIREMENTS

ALL LEVELS (GENERAL), (DEMOGRAPHY), (ECONOMICS), (GEOGRAPHIC INFORMATION SYSTEMS), AND (SOCIAL/BEHAVIORAL):

Demonstrated ability to act independently; flexibility; tact.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Research Manager I (General)	4/1/76	12/19/79	--
Research Manager I (Demography)	12/19/79	--	--
Research Manager I (Economics)	9/7/76	12/19/79	12/19/79
Research Manager I (Geographic Information Systems)	7/24/90	--	--
Research Manager I (Social/Behavioral)	4/1/76	12/19/79	--
Research Manager II (General)	4/1/76	12/19/79	--
Research Manager II (Demography)	12/19/79	--	--
Research Manager II (Economics)	9/7/76	12/19/79	12/19/79
Research Manager II (Geographic Information Systems)	7/24/90	--	--
Research Manager II (Social/Behavioral)	4/1/76	12/19/79	--
Research Manager III (General)	4/1/76	12/19/79	--
Research Manager III (Demography)	3/21/95	--	--
Research Manager III (Geographic Information Systems)	7/24/90	--	--
Research Manager III (Social/Behavioral)	4/1/76	12/19/79	--

SPEC: RESEARCH PROGRAM SPECIALIST (VARIOUS CLASSES) CONSOLIDATED SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

RESEARCH PROGRAM SPECIALIST (VARIOUS CLASSES)
Consolidated Series Specification)
(Established April 1, 1976)

Schem Code	Class Code	Class
LQ80	5742	Research Program Specialist I
LQ83	5833	Research Program Specialist I (Demography)
LQ90	5830	Research Program Specialist I (Economics)
LQ91	5832	Research Program Specialist I (Fire and Fuels)
LQ93	7418	Research Program Specialist I (Geographic Information Systems)
LQ88	5893	Research Program Specialist I (Health)
LQ92	3501	Research Program Specialist I (Market Research)
LQ84	5619	Research Program Specialist I (Mental Health)
LQ85	5600	Research Program Specialist I (Range Management/ Wildlife Ecology)
LQ81	7855	Research Program Specialist I (Remote Sensing/ Watershed)
LQ82	5756	Research Program Specialist I (Social/Behavioral)
LQ70	5758	Research Program Specialist II
LQ77	5771	Research Program Specialist II (Demography)
LQ73	5835	Research Program Specialist II (Economics)
LQ74	5836	Research Program Specialist II (Fire and Fuels)
LQ79	7419	Research Program Specialist II (Geographic Information Systems)
LQ78	5764	Research Program Specialist II (Health)
LQ76	5620	Research Program Specialist II (Mental Health)
LQ75	5723	Research Program Specialist II (Occupational Health: Pharmacology/Toxicology)
LQ72	5767	Research Program Specialist II (Social/Behavioral)
LQ71	6001	Research Program Specialist II (Soil Erosion)
LQ67	5770	Research Program Specialist III (Demography)
LQ62	7909	Research Program Specialist III (Finance Economics)
LQ66	7420	Research Program Specialist III (Geographic Information Systems)
LQ61	5861	Research Program Specialist III (Resource Economics/Operations Research)
LQ63	6012	Research Program Specialist III (Soil Vegetation)
LQ65	5733	Research Program Specialist III (Transportation Economics)

DEFINITION OF SERIES

Research Program Specialists are responsible for independently

planning, organizing, and conducting complicated studies in a variety of areas, requiring knowledge and abilities beyond the journey level, which affect programs or systems development within the State.

Incumbents in these classes provide expert consultative services on the feasibility, impact, or potential of a variety of State operations, projects, or proposals to interested parties. They advise management, departmental staff, legislative bodies, governmental entities, commissions, and agencies on findings related to the assigned area of research.

Incumbents may direct a small staff on a periodic basis. Special parenthetical requirements must be met in addition to requirements for Research Program Specialist (General). Emphasis is on independent research skills, with a background in a specific occupational area required. The term research as applied to this class series is defined as systematic, critical, intensive investigation directed toward either a more comprehensive knowledge of the subject or for use in the resolution of program-related issues. This does not include library research solely to gather information; preparing and designing plans, projects, and specifications for transportation or construction projects; or scientific research in laboratories.

Entry into this series typically comes at the entry level from college recruitment sources, or through related State classifications at a lower level. Normally each professional discipline area will have its own separate class(es) which are designated by use of one or more of the specified levels followed by a parenthetical designation of the program specialty. Each special program incorporated into this specification will utilize only the class(es) that appropriately describe the type and level of work performed, and the duties and responsibilities assigned to positions which are comparable to the appropriate level(s) described in this series specification.

FACTORS AFFECTING POSITION ALLOCATION

Overall scope and complexity of the research program and the relative complexity and professional requirements of the specific research project.

Other factors include: top departmental management's view of the employee's role, independence of action, level of decision making, degree of originality of research techniques employed, uniqueness of activities, impact and ultimate usage of conclusions and recommendations, sensitivity of projects, and role of incumbent in the organization. A composite evaluation of all of these differentiating factors will be employed in making determinations on all allocations.

DEFINITION OF LEVELS

RESEARCH PROGRAM SPECIALIST I

The positions are characterized by assignments which require, on a regular basis, a high degree of skill above the journey level. Under general direction, employees at this level independently develop and utilize research methodology and techniques in areas where precedents are lacking or a sparse body of knowledge or experience in the area

exists.

Incumbents work independently with primary responsibility for a major project or activity.

RESEARCH PROGRAM SPECIALIST II

The positions are identified by top departmental management as requiring the service of the most highly skilled practitioners who serve as prime resource persons and innovators in the subject matter of their occupations.

Incumbents have responsibility for designing and directing major complex research projects or activities.

RESEARCH PROGRAM SPECIALIST III

A position is identified by top departmental management to be occupied by an individual who is widely recognized as having distinguished herself/himself in a special field of knowledge and who will serve as the department's top expert in that field.

Incumbents report to the highest level in the department and are the advisor on complicated research projects and studies.

SCOPE:

Incumbents in this parenthetical specialty determine the scope of research and perform statistical activities requiring a broad understanding of complex research and statistical methods and synthesize complicated data from a variety of disciplines. The general class requires overall comprehension of advanced research methodology and statistical procedures.

MINIMUM QUALIFICATIONS

RESEARCH PROGRAM SPECIALIST I

Experience and education which provide ability to perform successfully as a Research Program Specialist at the level and in the specialty for which application is made.

and

Either I

Experience: One year in the California state service performing research duties at a level of responsibility equivalent to that of a Research Analyst II.

Or II

Experience: Three years of progressively responsible technical research experience above the trainee level engaged in the collection, compilation, analysis, and interpretation of data. (A Doctoral Degree in Economics, Psychology, Sociology, or a research-oriented field may be substituted for two years of the required experience. A master's degree in one of the above fields may be substituted for one year of the required experience.) (Experience in the California state service applied toward this requirement must include one year of experience in a class at a level of

responsibility equivalent to a Research Analyst II.) and

Education: Graduation from college with any major but with extensive course work in economics, psychology, sociology, or a related research-oriented field. This must include at least six semester hours in statistics.

RESEARCH PROGRAM SPECIALIST II

Experience and education which provide ability to perform successfully as a Research Program Specialist at the level and in the specialty for which application is made.

and

Either I

Experience: One year in the California state service performing research duties in a class at a level of responsibility equivalent to that of a Research Program Specialist I.

Or II

Experience: Four years of progressively responsible technical research experience above the trainee level engaged in the collection, compilation, analysis, and interpretation of data. (A Doctoral Degree in Economics, Psychology, Sociology, or a research-oriented field may be substituted for two years of the required experience. A master's degree in any one of the above fields may be substituted for one year of the required experience.) (Experience in the California state service applied toward this pattern must include one year of experience in a class at a level of responsibility equivalent to a Research Program Specialist I.) and

Education: Graduation from college with any major but with extensive course work in economics, psychology, sociology, or a related research-oriented field. This must include or be supplemented by at least six semester hours in statistics.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Research methods and techniques; application of computerized models to research data; statistical and other methods used in the analysis and projection of data; survey methods and analytical techniques; operations research methods.

Ability to: Communicate effectively to individuals and groups related to the area of research; analyze and make recommendations; plan and carry out research projects; prepare and present technical reports; establish and maintain cooperative relationships with others.

SPECIAL PERSONAL REQUIREMENTS

ALL LEVELS:

Demonstrated ability to act independently; initiative; flexibility; and tact.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Research Program Specialist I	4/1/76	12/19/79	--
Research Program Specialist I (Demography)	1/5/78	--	--
Research Program Specialist I (Economics)	8/9/77	12/19/79	12/19/79
Research Program Specialist I (Fire and Fuels)	3/7/00	--	--
Research Program Specialist I (Geographic Information Systems)	7/24/90	--	--
Research Program Specialist I (Health)	7/7/82	--	--
Research Program Specialist I (Market Research)	7/26/88	--	--
Research Program Specialist I (Mental Health)	6/7/79	--	--
Research Program Specialist I (Range Management/Wildlife Ecology)	9/30/81	12/4/84	12/4/84
Research Program Specialist I (Remote Sensing/Watershed)	2/1/84	--	--
Research Program Specialist I (Social/Behavioral)	4/1/76	--	--
Research Program Specialist II	4/1/76	9/7/76	--
Research Program Specialist II (Demography)	3/21/95	--	--
Research Program Specialist II (Economics)	10/4/77	12/19/79	12/19/79
Research Program Specialist II (Fire and Fuels)	3/7/00	--	--
Research Program Specialist II (Geographic Information Systems)	7/24/90	--	--
Research Program Specialist II (Health)	4/1/76	9/7/76	--
Research Program Specialist II (Mental Health)	6/7/79	--	--
Research Program Specialist II (Occupational Health: Pharmacology/Toxicology)	4/9/81	--	--
Research Program Specialist II (Social/Behavioral)	4/1/76	9/7/76	--
Research Program Specialist II (Soil Erosion)	5/31/83	--	--
Research Program Specialist III (Demography)	3/21/95	--	--
Research Program Specialist III (Finance Economics)	4/6/93	--	--
Research Program Specialist III (Geographic Information Systems)	7/24/90	--	--
Research Program Specialist III (Resource Economics/	12/12/78	--	--

Operations Research)			
Research Program Specialist III (Soil Vegetation)	5/31/83	--	--
Research Program Specialist III (Transportation Economics)	4/22/86	--	--

SPEC: SECRETARY
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

SECRETARY

Series Specification
(Established June 8, 1977)

SCOPE

This series specification describes three classes in the California state service which perform secretarial duties for high-level State administrators.

Schem Code	Class Code	Class
CD30	1176	Secretary
CD60	1247	Executive Secretary I
CD50	1245	Executive Secretary II

DEFINITION OF SERIES

Incumbents screen incoming correspondence, refer to appropriate staff member for reply, and follow up to insure that deadlines are met; arrange correspondence for administrator's personal reply in order of priority with appropriate background material attached for reference; independently or in accordance with general instructions, compose correspondence on a wide range of subjects requiring a thorough knowledge of the procedures and policies of the office; review outgoing correspondence prepared by other staff members for administrator's signature for consistency with administrative policy as well as for format, grammatical construction, and clerical error; gather and summarize data; brief reports and correspondence; attend meetings and conferences, take and/or summarize notes into minutes, and distribute minutes; screen a variety of visitors and telephone calls, and where appropriate, refer to other staff members or personally provide authoritative information on established agency programs and policies; arrange meetings for administrator, prepare agenda, and make adjustments as necessary in scheduled meeting times; relieve the administrator of routine office details; maintain confidential and administrative files.

FACTORS AFFECTING POSITION ALLOCATION

Relative level of difficulty, variety, complexity of duties, independence of action and decision, the degree of supervision received and the level of the administrator to whom the secretary reports are factors used in differentiating between levels.

Although there is a direct relationship between the scope of the administrator's responsibility and the possible scope of the secretary's responsibility, secretarial positions are not classified solely on the basis of the level of the supervisor. Other factors affecting the scope of the secretary's responsibility are the willingness of the supervisor to delegate to his/her secretary, the

secretary's willingness to assume delegated responsibilities, the presence of other positions that tend to dilute the secretary's responsibilities, and the limitations of clerical and administrative tasks that may be delegated to the secretary due to the technical nature of the supervisor's function.

DEFINITION OF LEVELS

SECRETARY

This is the journeyperson level. Under general direction and following general procedures, incumbents in a secretarial capacity receive and screen telephone calls and visitors, use considerable judgment in providing factual information in response to numerous inquiries; establish and maintain confidential and administrative files and prepare summaries of data pertinent to the work of the supervisor or the office. The work typically requires a detailed knowledge of the programs, policies and activities of the employing unit.

EXECUTIVE SECRETARY I

This is the advanced journeyperson level. Under direction of the administrator of a major subdivision of a large State agency or a comparable level executive, incumbents perform difficult and responsible secretarial work and relieve the administrator of a variety of administrative and office details.

Positions at this level typically exist in major subdivisions or large field installations of large State agencies. The secretary's supervisor must have complex program responsibility requiring careful coordination of activities supervised, a considerable amount of responsible policy determination and a substantial amount of demanding personal contact with citizen groups and officials of other governmental agencies.

Positions are allocated to this level where the administrator who is the secretary's supervisor has delegated a substantial amount of administrative detail and nonroutine work to the secretary. The potential for the level of delegated duties is directly related to the importance and responsibility of the position of the administrator, the nature and scope of the functions for which the administrator is responsible, and the level of public contacts.

EXECUTIVE SECRETARY II

This is the most advanced level in this series. Under direction of the chief administrative officer of a State agency, with widest latitude for independent action, incumbents perform especially difficult and responsible secretarial work, relieve the administrator of a wide variety of administrative and office details, and to do other related work.

MINIMUM QUALIFICATIONS

SECRETARY

Either I

In the California state service, one year of experience performing clerical duties at a level of responsibility not less than that of an Office Assistant, Range B.

Or II

Two years of experience in clerical work. [Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience. Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.]

EXECUTIVE SECRETARY I

Either I

In the California state service, one year of experience performing secretarial duties at a level of responsibility not less than that of Secretary.

Or II

Three years of experience in clerical work at least one year of which shall have been in a responsible secretarial position performing a variety of difficult secretarial work. (Experience in California state service applied toward the special one-year requirement must be in a class with a level of responsibility not less than that of Office Technician.) [Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience. Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.]

EXECUTIVE SECRETARY II

Either I

One year of experience in the California state service in a secretarial position performing the duties of an Executive Secretary I.

Or II

Two years of experience in the California state service performing secretarial duties at a level of responsibility not less than that of Secretary.

Or III

Four years of experience in clerical work at least two years of which shall have been in a responsible secretarial position performing a variety of difficult secretarial work. (Experience in California state service applied toward the special two-year requirement must be in a class with a level of responsibility not less than that of Office Technician.) [Academic education above the twelfth grade may be substituted for one year of the required general experience on the basis of either (a) one year of general

education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience. Students who are enrolled in the last semester or its equivalent of course work, which upon completion will fulfill these requirements, will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.]

KNOWLEDGE AND ABILITIES

SECRETARY

Knowledge of: Modern office methods, supplies and equipment; business English and correspondence.

Ability to: Read and write English at a level required for successful job performance; type at 40 words per minute; perform difficult clerical work; make clear and comprehensive reports and keep difficult records; prepare correspondence independently; communicate effectively; meet and deal tactfully with the public; and direct the work of others.

EXECUTIVE SECRETARY I
EXECUTIVE SECRETARY II

Knowledge of: Modern office methods, supplies, equipment and procedures with particular reference to the work involved in the office of an administrative official; business English and correspondence.

Ability to: Type at a speed of 45 words per minute; read and write English at a level required for successful job performance; direct the work of other support staff; perform difficult clerical work; keep difficult records; make briefs of reports and correspondence and compose letters or reports independently or from instructions, utilizing a wide knowledge of vocabulary, grammar, and spelling; perform minor administrative assignments independently; handle with courtesy and tact a wide variety of public contacts both on the telephone and in person; communicate effectively; understand and carry out directions following a minimum of explanation; analyze situations accurately and take effective action.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

A demonstrated interest in assuming increasing responsibility; mature judgment; loyalty; poise; tact; and discretion.

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

Education equivalent to completion of the twelfth grade; ability to take dictation at 110 words per minute.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Secretary	10/1/77	12/6/94	--
Executive Secretary I	1931	12/6/94	10/1/77
Executive Secretary II	1/21/61	12/6/94	10/1/77

SPEC: SENIOR ADMINISTRATIVE ANALYST (ACCOUNTING SYSTEMS)
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	JM32
Class Code:	5302
Established:	1/18/52
Revised:	12/1/66
Title Changed:	--

SENIOR ADMINISTRATIVE ANALYST (ACCOUNTING SYSTEMS)

DEFINITION

Under general direction, to supervise the work of subordinate administrative analysts; to make the more difficult and complex studies of the accounting systems and financial organization, policies, procedures, and practices of State agencies and to prepare reports continuing recommendations; to provide consultive service to State officials; and to do other related work.

TYPICAL TASKS

Plans, assigns, and reviews work; gives instructions; maintains discipline; and, subject to policy review, passes upon technical problems involved in supervising a group of administrative analysts engaged in making studies of the accounting systems and financial organization, policies, procedures, and practices of State agencies and making reports containing recommendations; may make analytical studies of the most complex accounting systems of State agencies and formulates new or revised systems to meet their accounting needs; makes studies on major problems concerning statewide financial administration; evaluates existing and proposed financial organization, policies, and procedures frequently involving the fiscal relationship of the State with other public and private agencies; prepares factual reports with recommendations based on studies and surveys; prepares manuals of accounting procedures and guides and assists in the installation of new procedures and systems; advises agency officials on accounting and fiscal problems; analyzes budget requests and makes recommendations on their necessity and feasibility; does research on legislation pertaining to fiscal matters and revises accounting procedures to conform; interviews and consults with departmental officials and officers of outside agencies; dictates correspondence.

MINIMUM QUALIFICATIONS

Either I

One year of experience in California state service performing the duties of an Associate Administrative Analyst (Accounting Systems).

Or II

Experience: Four years of increasingly responsible technical experience in governmental, commercial, or public accounting performing any one or a combination of the following types of work:

1. Development and installation of varied accounting systems. or

2. Preparation of comprehensive and complex financial statements and tax returns. or

3. Directing or assisting in the direction of the accounting and budgetary work of a business concern or governmental agency. or

4. Analytical and critical examination of financial records and books of accounts of business concerns or governmental agencies.

[At least one year of the qualifying experience shall have been in the full-time development and installation of varied accounting systems and shall have been equivalent in level to an Associate Administrative Analyst (Accounting Systems) in California state service.] and

Education: Either

1. Equivalent to graduation from college, with specialization in accounting. or

2. Completion of either:

   a. A prescribed professional accounting curriculum given by a residence or correspondence school of accountancy, including courses in elementary and advanced accounting, auditing, cost accounting and business law; or

   b. The equivalent of 16 semester hours of professional accounting courses given by a collegiate-grade residence institution, including courses in elementary and advanced accounting, auditing, and cost accounting; and three semester hours of business law.

KNOWLEDGE AND ABILITIES

Knowledge of: Accounting principles and practices; governmental accounting, budgeting, and fiscal management; uniform accounting system and financial organization and procedures of the State of California; principles of organization, administration, and management; administrative survey principles and techniques to the analysis and development of accounting and financial organization, procedures, and problems of governmental agencies; principles of public administration; principles and techniques of personnel management and supervision; office methods and procedures; statistical methods; principles and procedures of automatic data processing systems; department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Direct effectively the work of technical and clerical assistants; establish and maintain cooperative relationships with representatives of public and private agencies; prepare questionnaires and interview effectively; prepare comprehensive reports and compile manuals of accounting procedures; analyze data and draw sound conclusions; speak and write effectively; analyze situations accurately and adopt an effective course of action; apply

administrative survey principles and techniques to the analysis and development of accounting and financial organization, procedures, and problems of governmental agencies; effectively contribute to the department's affirmative action objectives.

SPEC: SENIOR LEGAL TYPIST/LEGAL SECRETARY SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

SENIOR LEGAL TYPIST
LEGAL SECRETARY
Series Specification
(Established May 5, 1999)

SCOPE

This series specification describes two classes used in the California state service, which perform a variety of legal support duties in a legal program within a State agency.

Schem Code	Class Code	Class
CC45	3224	Senior Legal Typist
CE20	1282	Legal Secretary

DEFINITION OF SERIES

Senior Legal Typists and Legal Secretaries perform a variety of legal secretarial and administrative duties necessary to maintain the support functions of a legal office.

FACTORS AFFECTING POSITION ALLOCATION

Relative degree of difficulty, variety and complexity of duties, independence of action and decision-making, the level of supervision received, and scope and complexity of the legal program within a Department are factors used in differentiating between the levels.

Although there is a direct relationship between the scope of the attorney's and legal secretary's responsibilities, the incumbent's skill and knowledge level, ability to perform independently and assume delegated responsibilities, and the presence of other positions that tend to dilute the secretary's tasks are also considered in position allocation. Additional information regarding functions performed, complexity factors, and scope of responsibility are contained in a separate document titled "Allocation Guidelines for Senior Legal Typist/Secretary Series."

DEFINITION OF LEVELS

SENIOR LEGAL TYPIST

This class is typically used for incumbents performing the less complex legal secretarial work in State service. Under general supervision, in either a secretarial capacity or in a typing pool, incumbents perform legal typing and difficult clerical work that may involve transcribing dictation from a dictating machine and performing related office work required in preparing and processing a variety of legal documents.

LEGAL SECRETARY

Incumbents in Range A perform the full range of legal secretarial work. Under general supervision, in a secretarial capacity, incumbents type, format, file, and serve legal pleadings in multiple jurisdictions, including State, Federal, and appellate courts or Office of Administrative Hearings; perform complex clerical work; and coordinate and schedule court-related services with specific instruction.

Incumbents in Range B perform the most complex legal secretarial work. Under direction, incumbents independently perform the most difficult and responsible legal secretarial and clerical work, with minimum instruction, involving either: (1) work in a legal office with Level IV attorneys; or (2) work for a chief legal administrator with major administrative responsibility for a complex legal program and a large professional staff.

MINIMUM QUALIFICATIONS

SENIOR LEGAL TYPIST

Either I

Experience: One year of experience in typing and clerical work, at least six months of which shall have been in work of a legal nature requiring the preparation of legal correspondence, petitions, briefs, motions, depositions, and various legal notices and forms. Academic education above the 12th grade may be substituted for six months of the required general experience on the basis of either one year of general education being equivalent to three months of general experience, or one year of education of a business or commercial nature being equivalent to six months of general experience.

Or II

Completion of a certificated legal secretarial program at either a regionally accredited college or business school approved by the Bureau of Private Postsecondary and Vocation Education and accredited by the Accrediting Council for Independent Colleges and Schools may be substituted for all of the required general and legal experience.

LEGAL SECRETARY

Either I

Experience: One year of experience in the California state service performing the duties of a Senior Legal Typist, Range B.

Or II

Experience: Two years of experience in a private law firm, corporate law office, or a legal program in a governmental agency performing a full range of legal secretarial duties, which requires the preparation of legal documents for filing and service. [(1) Academic education above the 12th grade may be substituted for six months of the required experience on the basis of either (a) one year of the general education being equivalent to three months of the required experience; or (b) one year of education of a business or commercial nature being equivalent to six months of the required experience; or (2) Completion of a certificated legal secretarial program at either a regionally accredited college or a business school approved by the Bureau of Private Postsecondary and Vocational Education and accredited by the Accrediting Council for Independent Colleges and Schools may be substituted for one year of the required experience.]

(Candidates who are within six months of satisfying the experience

requirement for this class will be admitted to this examination, but they must fully meet the experience requirement before being eligible for appointment.)

KNOWLEDGE AND ABILITIES

SENIOR LEGAL TYPIST

Knowledge of: Technical legal terms and various legal forms and documents and their processing; modern office methods, supplies, and equipment; business English and correspondence.

Ability to: Type at a speed of 45 words per minute; read and write English at a level required for successful job performance; establish and maintain effective working relationships; prepare correspondence independently; perform difficult legal clerical work including the ability to process a large variety of legal documents, spell correctly, use good English, and make arithmetic computations; transcribe accurately difficult dictation involving a variety of legal terms from a dictating machine; communicate effectively; follow directions; analyze situations accurately and take effective action.

LEGAL SECRETARY

Knowledge of: All of the above, and an understanding of the judicial process, Department and legal procedures and practices, and multiple and specialized areas of law; proper format of State and Federal citations; use of legal resources from traditional library references and software applications.

Ability to: All of the above, and type, format, file, and serve legal pleadings in multiple jurisdictions, including State, Federal and appellate courts, or Office of Administrative Hearings; independently perform complex clerical and legal secretarial work; coordinate and schedule legal services; screen mail, visitors, and telephone calls and take appropriate action; interact with courts, administrative agencies, governmental entities, co-counsels, opposing counsels, or witnesses as directed by the attorney ensuring deadlines are met; compose correspondence; give information and provide assistance using good judgment and discretion; maintain case and administrative files and records; may act in a lead capacity over clerical staff including legal typists.

SPECIAL PERSONAL CHARACTERISTICS

SENIOR LEGAL TYPIST

A demonstrated interest in assuming increasing responsibility.

LEGAL SECRETARY

A demonstrated interest in assuming increasing responsibility, mature judgment, loyalty, poise, tact, and discretion.

ADDITIONAL DESIRABLE QUALIFICATION

ALL LEVELS:

Education equivalent to completion of the 12th grade.

Class History

Class	Date Established	Date Revised	Title Changed
Senior Legal Typist	7/29/86	5/5/99	5/5/99
Legal Secretary	6/22/62	5/5/99	--

SPEC: SENIOR PETROLEUM AND MINING APPRAISAL ENGINEER
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	HG30
Class Code:	3483
Established:	8/6/38
Revised:	12/14/67
Title Changed:	--

SENIOR PETROLEUM AND MINING APPRAISAL ENGINEER

DEFINITION

Under direction, to perform valuation and economic research work required for the appraisal of petroleum and mining properties for property tax purposes; to serve as the Board of Equalization's representative in dealing with county assessors and with the oil and mining industries; and to do other related work.

TYPICAL TASKS

Independently makes economic studies, inspections, and appraisals of oil and gas and mining properties, including drilling and producing, mining and milling, and manufacturing plants and equipment; makes studies of unit cost factors and analyzes information for trends in the petroleum and mining industries; consults with assessors to promote uniformity in assessment of mineral properties; prepares reports and manuals for the Board of Equalization and also for publication; assists assessors in in stalling modern petroleum and mining appraisal systems and advises and trains their deputies in appraisal methods and procedures; consults with public and private agencies in the collection and analysis of information relating to the appraisal of mineral producing properties.

MINIMUM QUALIFICATIONS

Experience: Four years' experience in the valuation or development and exploitation of petroleum properties.

and

Education: Equivalent to graduation from college with specialization in mining, petroleum, or geological engineering or in petroleum geology. (Additional qualifying experience in petroleum engineering or petroleum geology may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: Factors involved in the valuation of petroleum properties; principles of petroleum and mining engineering, production and distribution methods, and the extent of the petroleum and mining industry in California; principles and techniques of personnel management and supervision; purposes, organization, and

procedure of offices of local assessors.
Ability to: Direct the work of technical assistants; assemble and analyze information relative to petroleum and mining property values; advise local assessors and assist in the installation of modern systems of petroleum and mining appraisal; establish and maintain cooperative relations with those contacted in the work; keep accurate records, dictate difficult correspondence, and prepare reports on petroleum and mining property values.

SPECIAL PERSONAL CHARACTERISTICS

Willingness to work at odd hours and to travel throughout the State.

SPEC: SHEETFED OFFSET PRESS OPERATOR SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

SHEETFED OFFSET PRESS OPERATOR
Series Specification
(Established January 19, 2000)

Schem Code	Class Code	Class
RJ99	7323	Sheetfed Offset Press Operator I
RJ97	7324	Sheetfed Offset Press Operator II
RJ95	7327	Sheetfed Offset Press Operator III
RJ85	7329	Sheetfed Offset Press Operator IV
RJ65	7330	Sheetfed Offset Press Operator V

DEFINITION OF SERIES

This consolidated series specification describes five levels of Sheet Offset Press Operators that are responsible for the completion of sheetfed offset printing undertaken by the State. Work includes receiving hard copies and/or negatives and plates; shooting negatives and further preparing the master copy; completing the assigned print jobs; proofing work; completing minor maintenance and repairs on equipment; setting up printing and finishing equipment; performing the finishing tasks needed to complete the assigned print jobs; fulfilling ancillary tasks related to reprographic work (training, maintaining log books and other record-keeping documents, maintaining supplies, etc.); and performing other related work. At the higher levels, incumbents are expected to serve as leadpersons over other operators and/or crews. Completion of the work is expected to adhere to safe printing and equipment practices following all precautions provided on machines and operating manuals.

DEFINITION OF LEVELS*

SHEETFED OFFSET PRESS OPERATOR I

This is the entry level of the Sheetfed Offset Press Operator series. Under supervision, incumbents perform the least complicated work involved in maintaining and operating a single unit offset press; and do other related work.

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* Additional information regarding functions performed, complexity factors, and scope of responsibility is contained in a separate document titled "Allocation Guidelines."

SHEETFED OFFSET PRESS OPERATOR II

This is the working level in the Sheetfed Offset Press Operator series. Under general supervision, incumbents perform moderate skilled work involved in maintaining and operating single and two-unit sheetfed offset presses; and do other related work.

SHEETFED OFFSET PRESS OPERATOR III

This is the journey level in the Sheetfed Offset Press Operator series. Under direction, incumbents perform skilled work (including four-color process) involved in maintaining and operating a small sheetfed offset press; operate small presses with two or more units; dot-to-dot registration, reverses, large color solid, duo-tones, color trapping, and four-color process work; and do other related work.

SHEETFED OFFSET PRESS OPERATOR IV

This is the advanced journey level in the Sheetfed Offset Press Operator series. Under direction, incumbents act as a lead person over a press assistant in the operation of a large sheetfed press; perform skilled work involved in maintaining and operating a large sheetfed press; and do other related work.

SHEETFED OFFSET PRESS OPERATOR V

This is the master journey level. Under direction, incumbents act as a lead operator over a second operator and press crew or act as leadperson over multiple operators and press crews; do highly skilled work involved in caring for and operating a four-color process sheetfed offset press; and do other related work.

MINIMUM QUALIFICATIONS

SHEETFED OFFSET PRESS OPERATOR I

Either I

In the California state service, one year of experience equivalent to a Bookbinder I.

Or II

One year of experience operating a sheetfed offset press.

SHEETFED OFFSET PRESS OPERATOR II

Either I

In the California state service, one year of experience equivalent to a Sheetfed Offset Press Operator I.

Or II

Two years of experience operating a multiunit sheetfed offset press.

SHEETFED OFFSET PRESS OPERATOR III

Either I

In the California state service, one year of experience performing the duties equivalent to either a Sheetfed Offset Press Operator II or a Webfed Offset Press Operator I.

Or II

Two years of experience operating a multicolor sheetfed offset press.

SHEETFED OFFSET PRESS OPERATOR IV

Either I

In the California state service, one year of experience performing the duties equivalent to either a Sheetfed Offset Press Operator III or a Webfed Offset Press Operator II.

Or II

Two years of journey level experience operating a large multicolor sheetfed offset press.

SHEETFED OFFSET PRESS OPERATOR V

Either I

In the California state service, one year of experience performing the duties equivalent to a Sheetfed Offset Press Operator IV.

Or II

Two years of experience as a lead press operator on a large multicolor sheetfed offset press.

KNOWLEDGE AND ABILITIES

SHEETFED OFFSET PRESS OPERATOR I

Knowledge of: Basic lithography; single unit press and its functions including delivery systems, dampening system, feeding system, inking system, and printing system; basic printing process (e.g., electrostatic, photochemical, and produced image); pre-press (imaging) and finishing processes; printing instruments and tools; use and care of blankets, rollers, and offset plates and their installations on presses; types of fountain solutions on sheetfed presses using a lithograph process; safety requirements applied in the operation of printing equipment and industrial workplace safety practices.

Ability to: Perform basic math calculations; take accurate measurements needed for effective job performance; perform mechanical tasks needed to operate equipment; communicate effectively; follow oral and written instructions to assure quality and quantity of production; make minor mechanical adjustments and repairs; maintain proper fountain solutions; maintain satisfactory personal relations with other workers; willingness to work under noisy conditions; willingness to work various shifts; understand and follow basic safety and environmental regulations and practices; stand for long periods of time; move and/or lift up to 50 pounds.

SHEETFED OFFSET PRESS OPERATOR II

Knowledge of: All of the above, and printing solvents and additives; print stock weights, textures, and finishes; types and uses of printing inks.

Ability to: All of the above, and operate a multiunit press; operate an envelope press; maintain registration between printing units; mix and match colors; produce a printing plate; may shoot and lay out negatives and half-tones.

SHEETFED OFFSET PRESS OPERATOR III

Knowledge of: All of the above, and multicolor sheetfed press; color and register control systems; four-color process work; types and uses of spot varnishes.

Ability to: All of the above, and operate a small sheetfed offset presses including perfecting units and powdering units; perform four-color process printing; dot-to-dot registration; trap colors; spot varnish; print large solids; pack the blanket and/or plate cylinder to register colors between units; print duotones and full reverses;

convert from single-sided to two-sided printing and return.

SHEETFED OFFSET PRESS OPERATOR IV

Knowledge of: All of the above, and operation and maintenance of a large sheetfed offset press; leadperson principles.

Ability to: All of the above, and lead and instruct the work of a press crew; coordinate the activities of a press crew; operate a large sheetfed offset press; make adjustments on all sheetfed offset press equipment and do minor repairs.

SHEETFED OFFSET PRESS OPERATOR V

Knowledge of: All of the above, and operation and maintenance of a large multiunit sheetfed offset press.

Ability to: All of the above.

ADDITIONAL DESIRABLE QUALIFICATION

ALL LEVELS:

Education equivalent to completion of the twelfth grade.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Flexibility to adapt to changing work priorities; work in a noisy environment; willingness to work nights and overtime; interact effectively and courteously with all levels of personnel, customers, vendors, and other parties; and vision sufficient to perform the essential functions of the job.

CLASS HISTORY

	Date Established	Date Revised	Title Changed
Sheetfed Offset Press Operator I	1/19/00	--	--
Sheetfed Offset Press Operator II	1/19/00	--	--
Sheetfed Offset Press Operator III	5/4/83	1/19/00	1/19/00
Sheetfed Offset Press Operator IV	5/4/83	1/19/00	1/19/00
Sheetfed Offset Press Operator V	5/4/83	1/19/00	1/19/00

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	JY20
Class Code:	5157
Established:	9/22/77
Revised:	07/10/07
Title Changed:	--

STAFF SERVICES ANALYST (GENERAL)

DEFINITION

This specification describes a recruiting and developmental class for persons qualified to perform analytical work in one or more areas of a broad range of governmental and managerial problems. Incumbents are assigned duties and responsibilities commensurate with their background and training. Under supervision, incumbents perform work of average difficulty in a wide variety of consultative and analytical staff services assignments such as program evaluation and planning; systems development; budgeting; planning; training; management; and personnel analysis; and do other related work. Work at this level is distinguished from lower-level assignments by the analytical and evaluative nature of the work, rather than the performance of process-oriented assignments.

This class is the entry through first journey level. Positions are permanently allocated to this class when the major portion of tasks performed do not include the more responsible, varied, and difficult assignments found in the full journeyperson level.

This deep class has three alternate ranges. Responsibilities include application of principles, practices, and trends of public and business administration, management, and supportive staff services expertise to perform various consultative and analytical tasks. At Range A, assignments are directly supervised and primarily structured, standard, and recurring. Duties and responsibilities require research, analysis, and the use of independent judgment and discretion to interpret and apply statutes, regulations, and policies and procedures to specific situations, rather than the mere application of detailed rules and procedures. The scope and effect of work generally involves routine analytical tasks impacting the immediate work unit.

Analysis of work at Range B is expected to show broader knowledge of the work environment, and organizational and/or departmental requirements. There is less direct review than at Range A, with greater breadth in assigned tasks. As job knowledge and skill increase, so do the number of tasks, which involves multitasking and imposed deadlines. Movement through Ranges A and B progress from very specific task-oriented assignments, accompanied by clear, detailed, and specific instructions, to more generally defined objectives including priorities and deadlines.

At Range C, there are distinct increases in the scope of the work and effect on programs and services. Incumbents are expected to use a more conceptual approach to problem solving and reasoning. At this

first journey level, the decisions regarding what work tasks need to be done depends upon the analysis of the subject, phase, or issues involved in each assignment, with the resulting chosen course of action potentially selected from many alternatives. Assignments are less complex in scope and duration than at the full journey level, although incumbents do have authority to plan, design, and carry out work within a clear framework established by the supervisor. Incumbents use judgment in interpreting and adapting guidelines such as policies, laws and rules, manuals, and work directions for application to specific cases or problems. Responsibilities involve increasing independence and judgment, accompanied by decreasing supervision, in the performance of a variety of analytical tasks such as program evaluation and planning; systems development; budgeting, planning, training, management, and personnel analysis; and other related work. Incumbents perform a wide range of established consultative and analytical activities of organizational concern impacting staff or customers at many locations.

TYPICAL TASKS

Studies the principles and techniques of the area of work to which assigned and, under supervision, applies them; participates in analytical studies of organization, procedures, budgetary requirements, and personnel management; gathers, tabulates, and analyzes data; draws organization, workload, and other charts; interviews and consults with departmental officials, employees, and others to give and secure information; prepares reports and makes recommendations on procedures, policies, and program alternatives; reviews and analyzes proposed legislation and advises management on the potential impact; makes decisions on financial, personnel, and other transactions of average complexity; works as a field representative in intergovernmental negotiations; and prepares correspondence.

MINIMUM QUALIFICATIONS

Either I

Education: Graduation with a Bachelor's degree from a recognized four-year accredited college or university. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

Or II

Work experience in the California state service may be substituted for the required education in Pattern I on a year-for-year basis by applicants who have at least six semester or nine quarter units of college level training in public or business administration, accounting, economics, political or social science, English, speech, statistics, law, or a closely related area.

KNOWLEDGE AND ABILITIES

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; and governmental functions and organization.

Ability to: Reason logically and creatively and utilize a variety of

analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work.

SPECIAL PERSONAL CHARACTERISTICS

Willingness as a learner to do routine or detailed work in order to learn the practical application of administrative principles; and demonstrated capacity for development as evidenced by work history, academic attainment, participation in school or other activities, or by well-defined occupational or vocational interests; and willingness and ability to accept increasing responsibility.

SPEC: STAFF SERVICES MANAGER SERIES
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

STAFF SERVICES MANAGER
Series Specification
(Established July 26, 1973)

SCOPE

This series specification describes three levels used throughout State service in the performance of a wide variety of fiscal, management, and staff services functions including such areas as personnel, budget, management analysis, administrative services, program evaluation and planning, and policy analysis and formulation. Incumbents in this series are typically subject-matter generalists who have demonstrated possession of the strong analytical skills, supervisory and/or managerial abilities, and personal qualifications to succeed in a broad range of fiscal, management, staff services, and related settings. Incumbents in this series are responsible for the effective resolution of a broad range of governmental, supervisory, and/or managerial problems. They conduct and/or review analytical studies and surveys; formulate procedures, policies, and program alternatives; make recommendations on a broad spectrum of administrative and program-related problems; review and analyze proposed legislation and advise management on its impact or potential impact; represent the State or a given department as assigned; and to do other related work.

This series is available for use in departments in California state service having technical fiscal, management, or technical staff services functions or units. Entry into the series is typically from the Associate Analyst level.

Schem Code	Class Code	Class
JY15	4800	Staff Services Manager I
JY12	4801	Staff Services Manager II (Supervisory)
JY10	4969	Staff Services Manager II (Managerial)
JY05	4802	Staff Services Manager III

FACTORS AFFECTING POSITION ALLOCATION

All Levels - Factors that affect allocation to the Staff Services Manager I, II, and III levels include the extent of supervisory and management responsibility reporting relationship, complexity of assigned work, and impact of decisions on statewide programs. Staff Services Manager II (Managerial) allocations can only be made to this class if the position is designated managerial pursuant to Government Code 18801.1.

DEFINITION OF LEVELS

STAFF SERVICES MANAGER I

The Staff Services Manager I level is typically the first working supervisor level. Employees at this level supervise a small group of analysts performing journeyperson level work and personally perform the most difficult or sensitive work. In the smaller departments or where the particular Staff Services function is not fully developed, a Staff Services Manager I may direct a function such as management analysis, budgeting, or personnel. In a medium to large department, or in a central agency function, positions at this level may supervise a portion of a function when it is so large as to require subordinate supervisors in terms of number of technical staff. On rare occasions, positions at this level may function as project leaders, coordinating the work of others through task force type organizations. This leadership role must be accompanied by a role as a highly skilled, independent consultant with the ability to act authoritatively in a functional specialty. Positions allocated to this level may be described by the following criteria:

(a) In a small- to moderate-sized department, directs a fully developed Staff Services function such as personnel, fiscal, or management analysis.

(b) In a medium size department, directs a developing Staff Services function.

(c) Supervises a small group of professional or technical analysts through the Associate Analyst level with responsibility for a major subsection of a Staff Services function.

(d) Functions as a recognized authority in an area of extreme sensitivity, with ongoing coordinating responsibility over other analysts in a sensitive area of a department's operation, usually on a task force or project basis.

(e) Directs a variety of Staff Services functions in a very small department as Chief of Administrative Services.

(f) Functions as a nonsupervisory staff specialist in a difficult and sensitive program development, policy, or coordination position.

STAFF SERVICES MANAGER II (SUPERVISORY)

This is the full supervisory level over analytical and administrative work. In most settings, persons at this level are in charge of a well established and fully developed Staff Services function in a moderate to large department. Positions at this level normally supervise a moderate to large number of technical staff and spend the majority of their time in supervisory activities as distinct from working level assignments. On rare occasions, positions at this level may function as nonsupervisory experts. Positions at the Staff Services Manager II level may be characterized by the following allocation criteria:

(a) In a moderate to large size department, directs a fully developed Staff Services function characterized by the supervision of a moderate to large number of subordinate technical staff.

(b) May supervise a small technical staff in a small- to medium-sized department in a specialized operation when one of the following

criteria are met:

(1) There is responsibility for a complex operation with multiple department influence.

(2) There is responsibility for a complex operation that is central to a department's primary mission.

(c) Supervises a large group of technical staff in a well defined and established departmental function, typically through subordinate supervisors.

(d) Functions as a nonsupervisory expert in a position that meets all the following criteria:

(1) The function to be performed is critical to the department's basic mission.

(2) The level of expertise required is definably greater than that for any other supervisory position at this level in terms of both education and experience.

(3) The person proposed for the position has an established reputation in the area of expertise required.

(e) In a small- to moderate-sized department, directs a variety of Staff Services functions as Chief of Administrative Services.

STAFF SERVICES MANAGER II (MANAGERIAL)

This is the first management level over analytical and administrative work. Positions in this class have significant responsibilities for formulating or administering agency or departmental policies and programs. In most settings, persons at this level are in charge of a well established and fully developed Staff Services function in a moderate to large department. Positions at this level normally supervise a moderate to large number of technical staff and spend the majority of their time in supervisory and managerial activities as distinct from working level assignments. On rare occasions, positions at this level may function as nonsupervisory experts. Positions at the Staff Services Manager II level may be characterized by the following allocation criteria:

(a) In a moderate to large size department, directs a fully developed Staff Services function characterized by the supervision of a moderate to large number of subordinate technical staff.

(b) May supervise a small technical staff in a small- to medium-sized department in a specialized operation when one of the following criteria are met:

(1) There is responsibility for a complex operation with multiple department influence.

(2) There is responsibility for a complex operation that is central to a department's primary mission.

(c) Supervises a large group of technical staff in a well defined and established departmental function, typically through subordinate

supervisors.

(d) Functions as a nonsupervisory expert in a position that meets all the following criteria:

(1) The function to be performed is critical to the department's basic mission.

(2) The level of expertise required is definably greater than that for any other supervisory position at this level in terms of both education and experience.

(3) The person proposed for the position has an established reputation in the area of expertise required.

(e) In a small- to moderate-sized department, directs a variety of Staff Services functions as Chief of Administrative Services.

STAFF SERVICES MANAGER III

Positions at this level have full management and supervisory responsibility in charge of a major Staff Services function, or functions, when it is so unusually large and complex as to require subordinate supervisors at the Senior level on a subfunctional or geographic basis. In those cases where the supervisory and management responsibility is minimum, it must be balanced out by responsibility for a function with multidepartmental or statewide impact requiring skills and knowledge at the highest level with responsibility for work of the most critical or sensitive nature as relates to a department's primary mission. Positions at this level are characterized by the following criteria:

(a) Supervises a fully developed Staff Services function in a large department characterized by multiple intermediate supervisors at the Staff Services Manager II level and a large technical staff.

(b) Functions as a full supervisor with responsibility for a moderate to large size technical staff in a highly specialized and complex operation when one of the following criteria are met:

(1) Responsibility for a highly complex Staff Services function with multidepartmental or servicewide impact.

(2) Responsibility for the major portion of a Staff Services function of the largest State departments, supervising a large staff through subordinate supervisors.

(c) In an agency setting, provides a high degree of expertise in developing major new programs of agency or servicewide scope.

(d) Provides a high level of assistance and expertise to an exempt director, executive officer, or Board member of a large, highly complex and sensitive department, in reaching organization goals, including responsibility for policy and program evaluation and recommendations often coupled with legislative liaison.

(e) Has full responsibility for a variety of Staff Services functions in a medium size department as Chief of Administrative Services, administering the functions through intermediate function

supervisors.

MINIMUM QUALIFICATIONS

STAFF SERVICES MANAGER I

Either I

One year of experience in the California state service performing analytical staff duties of a class with a level of responsibility not less than that of Associate Governmental Program Analyst.

(Applicants who have completed six months of service performing the duties as specified above will be admitted to the examination, but they must satisfactorily complete one year of this experience before they can be eligible for appointment.)

Or II

Experience: Three years of increasingly responsible management, personnel, fiscal, planning, program evaluation, or related analytical experience beyond the trainee level which shall have included the preparation of reports and the presentation of recommendations to management, at least one year of which must have been in a full journeyperson technical capacity. (Experience in the California state service applied toward this requirement must include one year performing the duties of a class with a level of responsibility not less than that of Associate Governmental Program Analyst.) (In appraising experience more weight will be given to the breadth of pertinent experience and the evidence of the candidate's ability to accept and fulfill increasing responsibilities than to the length of the experience.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

STAFF SERVICES MANAGER II

Either I

One year of experience in the California state service performing the duties of a Staff Services Manager I.

Or II

One year of experience in the California state service performing analytical staff duties of a class with a level of responsibility not less than that of Associate Governmental Program Analyst. and

Current employment in a class with a level of responsibility not less than that of Staff Services Manager I.

Or III

Two years of experience in the California state service performing analytical staff duties of a class with a level of responsibility not less than that of Associate Governmental Program Analyst.

Or IV

Experience: Four years of increasingly responsible management, personnel, fiscal, planning, program evaluation, or related analytical experience which shall have included the preparation of reports and the presentation of recommendations to management beyond the trainee level, at least one year of which must have been in a supervisory capacity. (Experience in the California state service applied toward this requirement must include one year performing the duties of a class with

a level of responsibility not less than that of Staff Services Manager I.) (In appraising experience more weight will be given to the breadth of pertinent experience and the evidence of the candidate's ability to accept and fulfill increasing responsibilities than to the length of the experience.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

STAFF SERVICES MANAGER III

Either I

One year of experience in the California state service performing the duties of a Staff Services Manager II (Supervisory) or Staff Services Manager II (Managerial).

Or II

One year of experience in the California state service performing analytical staff duties of a class with a level of responsibility not less than that of Staff Services Manager II (Supervisory) or Staff Services Manager II (Managerial). and

Current employment in a class with a level of responsibility not less than that of Staff Services Manager II (Supervisory) or Staff Services Manager II (Managerial).

Or III

Two years of experience in the California state service performing the duties of a Staff Services Manager I.

Or IV

Experience: Five years of increasingly responsible management, personnel, fiscal, planning, program evaluation, or related analytical experience which shall have included the preparation of reports and the presentation of recommendations to management beyond the trainee level, at least two years of which must have been in a supervisory capacity. [Experience in the California state service applied toward this requirement must include two years performing the duties of a class with a level of responsibility not less than that of Staff Services Manager II (Supervisory) or Staff Services Manager II (Managerial).] (In appraising experience more weight will be given to the breadth of pertinent experience and the evidence of the candidate's ability to accept and fulfill increasing responsibilities than to the length of the experience.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Principles, practices, and trends of public and business administration, including management and supportive staff services such as budget, personnel, management analysis, planning, program evaluation, or related areas; principles and practices of employee supervision, development, and training; program management; formal and informal aspects of the legislative process; the administration and department's goals and policies; governmental functions and

organization at the State and local level; department's Affirmative Action Program objectives; and a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; review and edit written reports, utilize interdisciplinary teams effectively in the conduct of studies; manage a complex Staff Services program; establish and maintain project priorities; develop and effectively utilize all available resources; and effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL REQUIREMENTS

ALL LEVELS:

Demonstrated ability to act independently, open-mindedness, flexibility, and tact.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Staff Services Manager I	7/26/73	2/4/81	--
Staff Services Manager II (Supervisory)	7/26/73	4/17/84	4/17/84
Staff Services Manager II (Managerial)	4/17/84	--	--
Staff Services Manager III	7/26/73	4/17/84	--

SPEC: STUDENT ASSISTANT
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	MF10
Class Code:	4870
Established:	5/3/72
Revised:	6/26/74
Title Changed:	--

STUDENT ASSISTANT

DEFINITION

Under close supervision and in a learner capacity, to assist in the performance of the administrative or technical duties required by the departmental assignment; and to do other related work.

JOB CHARACTERISTICS

Employment in this class is restricted to students who are admitted for enrollment in a curriculum the subject matter of which will prepare the student to assist in attaining the objectives of the departmental organization where he/she will be employed. Employment in the class is based on continued enrollment in a college program.

The class provides a means of part-time or temporary employment where by students may receive on-the-job instruction and perform work that will provide practical experience in work tasks related to their field of study and develop familiarity with the laws and programs administered by the State of California. The class may be used for persons who have completed academic requirements but are working toward professional certification or registration, for persons in certain other fields such as health education, for which experience is a prerequisite for entrance to graduate school and for persons who have received a degree but are taking additional required course work for a specific career field. This class is not intended to be used for permanent employment and no full-time permanent appointments will be made in this class.

TYPICAL TASKS

Participates in various phases of a planned training program; learns policies, procedures, and techniques; performs meaningful tasks which are valuable and necessary to the program of the department such as computation, programming, and analysis of data; gains practical experience in the professional or technical field of study; assists in research, analysis, review, and other related activities in the department.

MINIMUM QUALIFICATIONS

Proof of application for, or enrollment as a student in, an appropriate college or university program.

KNOWLEDGE AND ABILITIES

Knowledge of: Elementary principles and procedures as required by the hiring department.

Ability to: Reason logically, write effectively, analyze situations accurately, and adopt an effective course of action;
establish and maintain cooperative relations with those contacted in the work.

SPECIAL PERSONAL CHARACTERISTICS

Interest in the programs and aptitude for the work required by the department.

CALIFORNIA STATE PERSONNEL BOARD
SPECIFICATION

SYSTEMS SOFTWARE SPECIALIST
Series Specification
(Established July 24, 1975)

SCOPE

Classes in this series are used to analyze, design, code, implement, maintain, and evaluate computer software; this includes, but is not limited to, operating systems, control systems, proprietary software packages, telecommunications software, and database management software. These classes are also used as technical advisors to act as consultants to other information technology personnel in solving system problems and achieving the best use of available hardware and software resources; to act as leadperson or supervisor over other personnel; the classes are also used to coordinate and ensure effective operations of complex multiple hardware and software configurations; and to do other related work.

Computer software encompasses operating systems and utilities, telecommunications software, database management systems, special purpose vendor-supplied package software, special purpose control systems, and includes, but is limited to, both modified vendor-supplied systems and systems specifically developed by the user.

Entry into this series is typically through the Programmer II classification.

Schem Code	Class Code	Class
LM62	1585	Associate Systems Software Specialist (Technical)
LM60	1587	Systems Software Specialist I (Technical)
LM55	1373	Systems Software Specialist II (Technical)
LM58	1558	Systems Software Specialist II (Supervisory)
LM50	1367	Systems Software Specialist III (Technical)
LM52	1559	Systems Software Specialist III (Supervisory)

FACTORS AFFECTING POSITION ALLOCATION

Variety and complexity of work assignments, size of information technology activities, breadth of support activities, scope and consequence of decisions made, independence of action and decision, level of programming and analytical skills, and leadership or supervision exercised and direction received.

DEFINITION OF LEVELS

ALL LEVELS:

The level of a position is influenced both by the place of the positions in the organization structure and by the type and complexity of the equipment configuration. Generally, the more complex and larger the equipment configuration, the higher the level of the position.

All levels essentially perform duties involving the same types of duties and are involved with similar activities and tasks. The differences in level are a matter of level of discretion, recognized expertise, and the scope of the problems.

ASSOCIATE SYSTEMS SOFTWARE SPECIALIST (TECHNICAL)

Under supervision, independently performs assigned systems programming (software) work; and/or acts as leadperson over others performing systems software work; and/or participates on software project teams. This is the full journey level.

SYSTEMS SOFTWARE SPECIALIST I (TECHNICAL)

Under general supervision, acts as a leader on systems software projects, and/or works independently as a technical specialist on complex systems assignments. This is the advanced specialist level.

SYSTEMS SOFTWARE SPECIALIST II (TECHNICAL)

Under general supervision, acts as a team leader on the more complex systems software projects, and/or works independently as a high-level technical specialist on the more complex systems assignments. This is the expert specialist level.

SYSTEMS SOFTWARE SPECIALIST II (SUPERVISORY)

Under general supervision, acts as a supervisor on the more complex software systems or systems software projects.

SYSTEMS SOFTWARE SPECIALIST III (TECHNICAL)

Under administrative direction, works independently as the recognized technical specialist on the maintenance of the most complex software systems and software projects, and/or acts as a leader on projects involving the conversion to the most complex computer configurations.

SYSTEMS SOFTWARE SPECIALIST III (SUPERVISORY)

Under administrative direction, acts as a supervisor on projects involving the conversion to the most complex computer configuration and/or supervises a staff of software specialists responsible for the most complex assignments.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Unless otherwise stated, experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to other patterns to meet the total experience requirement.

ASSOCIATE SYSTEMS SOFTWARE SPECIALIST (TECHNICAL)

Either I

One year of experience in the California state service performing duties comparable to a Programmer II, which must include the performance of duties such as coding, designing, modifying, installing, evaluating, and maintaining computer software.

Or II

Eighteen months of progressively responsible experience in information technology systems study, design, and/or programming, which shall have included responsibilities such as coding, designing, modifying, installing, evaluating, and maintaining computer software. One year of experience in this pattern must include independent planning and software development, systems analysis, or systems programming (software) work.

Or III

Equivalent to graduation from a recognized college or university with a minimum of 24 semester or 36 quarter units in information technology-related coursework. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

SYSTEMS SOFTWARE SPECIALIST I (TECHNICAL)

Either I

One year of experience in the California state service performing duties comparable to an Associate Systems Software Specialist (Technical).

Or II

Thirty months of progressively responsible experience in information technology systems study, design, and programming, which shall have included responsibilities such as coding, designing, modifying, installing, evaluating, and maintaining computer software. One year of experience in this pattern must include independent systems programming, leadership over a group of systems software programmers, or participation on software project teams.

Or III

Thirty semester units or 45 quarter units of graduate work in information technology-related coursework from a recognized college or university.

SYSTEMS SOFTWARE SPECIALIST II (TECHNICAL)
SYSTEMS SOFTWARE SPECIALIST II (SUPERVISORY)

Either I

One year of experience in the California state service performing duties comparable to a Systems Software Specialist I (Technical).

Or II

Two years of experience in the California state service performing duties comparable to an Associate Systems Software Specialist (Technical).

Or III

Three years of progressively responsible experience in information technology systems study, design, and programming, which shall have included responsibilities such as coding, designing, modifying, installing, evaluating, and maintaining computer software. One year of experience in this pattern must include independent responsibility as a leader on systems software projects, or as a technical specialist on complex technology systems.

SYSTEMS SOFTWARE SPECIALIST III (TECHNICAL)
SYSTEMS SOFTWARE SPECIALIST III (SUPERVISORY)

Either I

One year of experience in the California state service performing duties comparable to a Systems Software Specialist II (Technical) or a Systems Software Specialist II (Supervisory).

Or II

Two years of experience in the California state service performing duties comparable to a Systems Software Specialist I (Technical) or Systems Software Specialist I (Supervisory).

Or III

Four years of progressively responsible experience in information technology systems study, design, and programming, which shall have included responsibilities such as coding, designing, modifying, installing, evaluating, and maintaining computer software. One year of experience in this pattern must include independent leadership responsibilities on complex systems software projects, or as a high-level technical specialist on the more complex systems assignments.

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Information technology systems (software) programming, equipment, and its capabilities and interfaces between hardware and software; and the requirements for the installation and implementation of the most complex information technology software systems.

Ability to: Write complex programs; develop detailed program specifications; analyze data and situations, reason logically and creatively, identify problems, draw valid conclusions, and develop effective solutions; apply creative thinking in the design and development of methods of processing information with information technology systems; establish and maintain cooperative relationships with those contacted in the course of the work; work under pressure; communicate effectively; prepare effective reports; coordinate the activities of technical personnel.

SYSTEMS SOFTWARE SPECIALIST II (SUPERVISORY)
SYSTEMS SOFTWARE SPECIALIST III (SUPERVISORY)

Knowledge of: All of the above, and the department's a manager's/supervisor's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment; and principles of personnel management, supervision, and training.

Ability to: All of the above, and supervise technical personnel; effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Associate Systems Software Specialist (Technical)	09/01/1975	09/03/2008	12/04/1984
Systems Software Specialist I (Technical)	09/01/1975	09/03/2008	12/04/1984
Systems Software Specialist II (Technical)	09/01/1975	09/03/2008	04/17/1984

Systems Software Specialist II (Supervisory)	03/20/1984	09/03/2008	--
Systems Software Specialist III (Technical)	08/17/1978	09/03/2008	04/17/1984
Systems Software Specialist III (Supervisory)	03/20/1984	09/03/2008	--

SPEC: TAX AUDITOR, BOARD OF EQUALIZATION
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

TAX AUDITOR, BOARD OF EQUALIZATION
Series Specification
(Established May 23, 1979)

SCOPE

This series specification describes seven Tax Auditor classifications used by the State Board of Equalization. These classes are used for positions with professional, supervisorial, or managerial responsibilities in the State Board of Equalization business taxes audit program.

Schem Code	Class Code	Class
JH53	4267	Tax Auditor, Board of Equalization
JH50	4281	Associate Tax Auditor, Board of Equalization
JH45	4282	Staff Tax Auditor, Board of Equalization
JH40	4280	Supervising Tax Auditor I, Board of Equalization
JH30	4277	Supervising Tax Auditor II, Board of Equalization
JH20	4271	Supervising Tax Auditor III, Board of Equalization
JH10	4270	Principal Tax Auditor, Board of Equalization

DEFINITION OF SERIES

Tax Auditors either: (1) conduct field audits of taxpayers' accounting books and records, using generally accepted auditing standards and procedures to ensure correct reporting of business taxes; or (2) perform audit-related functions in Headquarters. Supervising Tax Auditors I, II, and III either: (1) plan, direct, and evaluate the work of an audit crew, unit, or program; or (2) in the Hearing Section of the Legal Section, conduct informal tax hearings. The Principal Tax Auditor manages the State Board of Equalization's business taxes audit programs.

ENTRY LEVEL

Entry into this series is typically at the Tax Auditor classification.

DEFINITION OF LEVELS

TAX AUDITOR, BOARD OF EQUALIZATION

This is the recruiting/training and journey level of the series. Under close supervision, incumbents either: (1) conduct the least-to-moderately difficult field audits, assist in the more difficult field audits, correspond with taxpayers, and answer tax-related questions; or (2) in a Headquarters unit, review field audit reports

or petitions for redetermination and claims for refund and correspond and discuss the application of tax laws with taxpayers, attorneys, accountants, and District office staff.

ASSOCIATE TAX AUDITOR, BOARD OF EQUALIZATION

This is the full journey level in the series. Incumbents, under general direction, either: (1) conduct the more difficult and complex audits, which may include leading lower level auditors; or (2) in a Headquarters unit, review field audit reports or petitions for redetermination and claims for refund; prepare summaries and statements of fact for use in hearings or court proceedings; and correspond and discuss the application of tax laws with taxpayers, attorneys, accountants, and District office staff.

STAFF TAX AUDITOR, BOARD OF EQUALIZATION

This is the advanced journey or specialist level in the series. Incumbents, under general guidance, either: (1) conduct the most difficult and complex audits, typically consisting of the largest industrial corporations in the United States; or (2) review all field audit reports in a District office; or (3) in a Headquarters unit, perform specialized, complex auditing work.

SUPERVISING TAX AUDITOR I, BOARD OF EQUALIZATION

This is the first supervisory level in the series. Incumbents either: (1) supervise a large group of field auditors conducting audits of moderate to high level difficulty; or (2) supervise an audit group, in a Headquarters unit, performing moderate to high level specialized Headquarters audit functions.

SUPERVISING TAX AUDITOR II, BOARD OF EQUALIZATION

Incumbents at this level either: (1) at the first management level in all but the largest District Offices, through multiple subordinate supervisors, direct the audit program; or (2) in the largest district offices, supervise a large group of Associate and Staff Tax Auditors conducting the most difficult field audits or (3) in a Headquarter's unit, supervise an audit group performing the most difficult and highly specialized audit functions; or (4) in the Hearing Section of the Legal Section, conduct formal hearings on taxpayer's protests of audit procedures or findings, recommend the next appropriate step for cases, and present tax cases before the State Board of Equalization.

SUPERVISING TAX AUDITOR III, BOARD OF EQUALIZATION

This is the first management level of the series. Incumbents either: (1) direct, through multiple subordinate supervisors, the audit program in the largest district offices; or (2) direct the Headquarter's staff units performing the audit processing functions.

PRINCIPAL TAX AUDITOR, BOARD OF EQUALIZATION

This is the highest level in the series. The incumbent, under the general direction of the Deputy Director, Business Taxes Department, Board of Equalization, develops and interprets uniform policies, programs, and practices for the statewide administration of the business taxes audit program and directs the Headquarter's audit staff support activities for the business taxes audit program.

MINIMUM QUALIFICATIONS

ALL LEVELS:

Experience applicable to one of the following patterns may be combined, on a proportional basis, with experience applicable to another pattern to meet the total experience requirement.

Education:

Either I

Equivalent to graduation from college, with a specialization in accounting. (Registration as a senior student in a recognized institution will admit applicants to the examination; however, evidence of successful completion of the curriculum and the prescribed courses must be produced before being considered eligible for appointment.)

Or II

Completion of either:

a. A prescribed professional accounting curriculum given by a residence or correspondence school of accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; or

b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced accounting, auditing, and cost accounting, and three semester units of business law.

(Applicants who will complete course work requirements outlined under a and b above during the current quarter or semester will be admitted to the examination; however, evidence of successful completion of the curriculum and the prescribed courses must be produced before being considered eligible for appointment.)

ASSOCIATE TAX AUDITOR, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing duties at a level equivalent to Tax Auditor, Board of Equalization, Range B. (Promotional candidates within six months of satisfying this requirement will be admitted to the examination but must fully meet the requirement before being considered eligible for appointment.)

Or II

Three years of professional experience in government, commercial, or public auditing performing analytical or critical examination of records or books of account with responsibility for laying out audit

programs and determining verification procedures to be used in determining the scope of work to be performed, at least one year of which shall have been equivalent in responsibility to that involved in making the more difficult field or office audits. (Experience in California state service applied toward this pattern must include one year of experience at a level equivalent to Tax Auditor, Board of Equalization, Range B.)

STAFF TAX AUDITOR, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing duties at a level equivalent to Associate Tax Auditor, Board of Equalization.

Or II

Four years of professional experience in government, commercial, or public auditing performing analytical or critical examination of records or books of account with responsibility for laying out audit programs and determining verification procedures to be used in determining the scope of work to be performed, at least one year of which shall have been equivalent in responsibility to that involved in making the more difficult field or office audits. (Experience in California state service applied toward this pattern must include one year of experience at a level equivalent to Associate Tax Auditor, Board of Equalization.)

SUPERVISING TAX AUDITOR I, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing duties at a level equivalent to Associate Tax Auditor, Board of Equalization.

Or II

Four years of professional experience in government, commercial, or public auditing performing analytical or critical examination of records or books of account with responsibility for laying out audit programs and determining verification procedures to be used in determining the scope of work to be performed, at least one year of which shall have been equivalent in responsibility to that involved in supervising a crew conducting field audits to determine tax liability. (Experience in California state service applied toward this pattern must include one year of experience at a level equivalent to Associate Tax Auditor, Board of Equalization.)

SUPERVISING TAX AUDITOR II, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing duties at a level equivalent to Staff Tax Auditor, Board of Equalization, or Supervising Tax Auditor I, Board of Equalization.

Or II

Five years of professional experience in government, commercial, or public auditing, at least one year of which shall have been equivalent in responsibility to that involved in directing an audit program with several field crews of tax auditors or in performing highly specialized major audit functions in determining tax liability. (Experience in California state service applied toward

this pattern must include at least one year at a level equivalent to Staff Tax Auditor, Board of Equalization, or Supervising Tax Auditor I, Board of Equalization.)

SUPERVISING TAX AUDITOR III, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing duties at a level equivalent to Supervising Tax Auditor II, Board of Equalization.

Or II

Two years of experience in California state service performing duties at a level equivalent to Staff Tax Auditor, Board of Equalization, or Supervising Tax Auditor I, Board of Equalization.

Or III

Broad and extensive (more than five years) professional experience in government, commercial, or public auditing, at least two years of which shall have been equivalent in responsibility to that involved in directing an audit program with several field crews of tax auditors or in performing highly specialized major audit functions in determining tax liability. (Experience in California state service applied toward this pattern must include at least two years of experience at a level equivalent to Staff Tax Auditor, Board of Equalization, or Supervising Tax Auditor I, Board of Equalization.)

PRINCIPAL TAX AUDITOR, BOARD OF EQUALIZATION

Either I

One year of experience in California state service performing administrative or supervisory tax audit duties at a level equivalent to Supervising Tax Auditor III, Board of Equalization.

Or II

Two years of experience in California state service performing administrative or supervisory tax audit duties at a level equivalent to Supervising Tax Auditor II, Board of Equalization.

Or III

Broad and extensive (more than five years) professional auditing experience in government, commercial, or public auditing, at least two years of which shall have been equivalent in responsibility to that involved in directing an audit program, several field crews of tax auditors, or in performing highly specialized major audit functions in determining tax liability. (Experience in the California state service applied toward this requirement must include at least two years of experience at the level of Supervising Tax Auditor II, Board of Equalization.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: General accounting and auditing principles and procedures and business law.

Ability to: Apply the required knowledge; conduct audits or financial examinations of taxpayer's accounts and records; meet with and obtain the cooperation of persons subject to tax or regulation; create and maintain an atmosphere of good will in beginning and completing an audit and disclosing findings critical in nature;

analyze data and draw sound conclusions; analyze situations accurately and take effective action; prepare clear, complete, and concise reports; and communicate effectively.

ASSOCIATE TAX AUDITOR, BOARD OF EQUALIZATION

STAFF TAX AUDITOR, BOARD OF EQUALIZATION

Knowledge of: All of the above; and specialized practices and procedures used in tax auditing; provisions of the tax laws administered by the State Board of Equalization, related legal opinions and court decisions, and departmental policies, rules, and regulations; and organization of the State Board of Equalization, particularly the tax auditing programs.

Ability to: Apply the required knowledge.

SUPERVISING TAX AUDITOR I, BOARD OF EQUALIZATION
SUPERVISING TAX AUDITOR II, BOARD OF EQUALIZATION
SUPERVISING TAX AUDITOR III, BOARD OF EQUALIZATION
PRINCIPAL TAX AUDITOR, BOARD OF EQUALIZATION

Knowledge of: All of the above; principles, practices, and trends of public and business administration; principles and techniques of personnel management, supervision, and employer-employee relations; departmental administrative goals and policies; the State Board of Equalization's Affirmative Action Program objectives; and a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Apply the required knowledge; plan, organize, and direct the work of a staff engaged in tax auditing; develop the skills and abilities of subordinate staff; motivate subordinate staff to establish group and organizational goals; resolve complex supervisorial and managerial problems; and effectively contribute to the State Board of Equalization's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTICS

ALL LEVELS:

Willingness to travel and work odd hours away from the office.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Tax Auditor, Board of Equalization	1/11/89	--	--
Associate Tax Auditor, Board of Equalization	1/8/59	1/11/89	1/11/89
Staff Tax Auditor, Board of Equalization	5/23/79	1/11/89	1/11/89
Supervising Tax Auditor I, Board	1/8/59	1/11/89	--

of Equalization			
Supervising Tax Auditor II, Board of Equalization	1/8/59	1/11/89	--
Supervising Tax Auditor III, Board of Equalization	1/6/50	1/11/89	1/8/59
Principal Tax Auditor, Board of Equalization	5/14/80	1/11/89	--

SPEC: TAX COUNSEL SERIES

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

TAX COUNSEL
Series Specification
(Established January 22, 1991)

SCOPE

This series specification describes four classifications used by the Franchise Tax Board (FTB) and the Board of Equalization (BOE) to provide specialized legal services concerned with the administration of California tax law.

This series is available for use only by the FTB and the BOE.

Schem Code	Class Code	Class
OA75	6728	Tax Counsel
OA76	6733	Tax Counsel III (Specialist)
OA77	6734	Tax Counsel III (Supervisor)
OA78	6722	Tax Counsel IV

DEFINITION OF SERIES

Incumbents in these classes study, interpret, and apply laws, regulations, court decisions, and other legal authorities as required.

Typical tasks performed by Tax Counsels engaged in administering those provisions of the Revenue and Taxation Code for which the FTB and BOE have responsibility include, but are not limited to: applying and interpreting complex law involving individuals or sophisticated and unique business organizations and other governmental entities; conducting research and drafting legal opinions, position papers, rulings, briefs, orders, and pleadings; participating as departmental attorney or as hearing officer in connection with administrative proceedings involving proposed tax assessments or claims for refund; advising the FTB, BOE, departmental staff, local government entities, and the public with respect to the application of complex tax laws; appearing before the BOE in support of departmental positions, acting as departmental counsel with respect to personnel matters, and appearing in that capacity before both administrative law judges, boards, commissions, and the judiciary; assisting in court proceedings and pretrial discovery matters; supporting the attorney general in litigation against the Department and coordinating departmental efforts in that regard; drafting of legislation, regulations, and interpretive opinions; assisting in bankruptcy proceedings; advising departmental personnel with respect to the legal ramifications of proposed actions; working with advisory committees, citizens' groups, legislative, and professional associations on studies of ways to improve the laws administered by the FTB and BOE; speaking before tax forums, conferences, professional groups, and negotiating with outside counsel on the legal aspects of major tax disputes; and advising the respective Boards, departmental staff, and the public with respect to confidentiality of tax return information.

ENTRY LEVEL

Entry into this series requires membership in The California State Bar. The class of Graduate Legal Assistant, which requires eligibility to take the California State Bar examination, may also be used to recruit those interested in entry into this series.

DEFINITION OF LEVELS

ALL LEVELS:

Classes in this series generally perform similar duties. Differences between classes are determined primarily by (1) the level of difficulty, complexity, and sensitivity of the assignments given to the incumbent, (2) the degree of independence with which the incumbent performs an assignment, (3) the experience and expertise which the incumbent brings to those assignments, and (4) the value of the services rendered by the incumbent to the Department and to State service.

TAX COUNSEL

This is a recruitment and developmental class for persons qualified to practice law in the State of California. Incumbents assigned to Range A perform the least difficult professional legal work in the FTB or BOE. Based upon the appropriate alternate range criteria, incumbents advance to Range B, C, and D, and are assigned progressively more difficult professional legal work as their competency increases. Incumbents assigned to Range D are assigned the more complex and sensitive legal work in this class.

TAX COUNSEL III (SPECIALIST)

Incumbents in this class are well-experienced advanced or full journey level attorneys who have the experience and have developed the expertise necessary to capably perform the most complex and sensitive legal work of the FTB or BOE on an independent basis. A Tax Counsel III (Specialist) is usually assigned only the most important legal work such as (1) analyzing and advising on very complex tax questions arising under the laws administered by the FTB or BOE; (2) preparing arguments and responsive pleadings involving the most difficult tax issues at the judicial and administrative levels; and (3) drafting and analyzing complex legislation, opinions, rules, and regulations.

A Tax Counsel III (Specialist) may act in a lead capacity over the work of other attorneys.

TAX COUNSEL III (SUPERVISOR)

This is the first supervisory level. Incumbents plan, organize, and direct the work of a small staff of FTB or BOE attorneys and, in addition, develop strategy in complex State tax disputes or litigation. They may also personally participate in the most difficult and complex litigation matters, negotiation, hearings, legal research, and opinion drafting.

TAX COUNSEL IV

Incumbents in this class are the most experienced attorneys who are experts in

a broad or specialized area of law. They have demonstrated their ability to independently perform assignments consisting of the most complex and sensitive legal work of the department and consistently produce favorable results on these matters. Incumbents in this class are typically assigned the most complex legal matters and/or litigation of the greatest difficulty which include, but are not limited to, handling cases that are very likely to be appealed to the highest courts.

A Tax Counsel IV may act in a lead capacity over the work of other attorneys.

MINIMUM QUALIFICATIONS

ALL LEVELS:

All classes require active membership in The State Bar of California. (Applicants who are not members of The California State Bar but who are eligible to take The California State Bar examination or are in their final year of law school will be admitted to the examination but will not be considered eligible for appointment until they are admitted to The State Bar of California.)

TAX COUNSEL III (SPECIALIST)
TAX COUNSEL III (SUPERVISOR)

Six years of legal experience in the practice of law* in a governmental jurisdiction or in private practice, including three years of legal experience in the practice of tax law or directly related legal experience, including administrative and/or civil litigation. (Applicants who have completed five years and six months of legal experience and two years and six months of tax law or directly related legal experience, including administrative and/or civil litigation, will be admitted into the examination, but must complete the required six years of legal experience including the three years of tax law or directly related legal experience, including administrative and/or civil litigation, before they will be eligible for appointment.)

TAX COUNSEL IV

Ten years of legal experience in the practice of law* in a governmental jurisdiction or in private practice, including four years of legal experience in the practice of tax law or directly related legal experience, including administrative and/or civil litigation, at a level of responsibility equivalent to a Tax Counsel III. (Applicants who have completed nine years and six months of legal experience, including three years and six months of tax law or directly related legal experience, including administrative and/or civil litigation, at a level of responsibility equivalent to a Tax Counsel III, will be admitted into the examination, but must complete the required ten years of legal experience, including the four years of tax law or directly related legal experience administrative and/or civil litigation, at a level of responsibility equivalent to a Tax Counsel III, before they will be eligible for appointment.)

KNOWLEDGE, SKILLS, AND ABILITIES

ALL LEVELS:

Knowledge of: How to conduct legal analysis (e.g., issue-spotting, rule

analysis, applying law to facts) to ensure relevant issues and information are identified; principles and practices for properly conducting legal research, such as ensuring law is current (i.e., "Shepardizing") and checking for recent amendments to statutes; general principles of jurisprudence including statutory construction and stare decisis; English language including: grammar, spelling, punctuation, sentence and paragraph structure, organization, and appropriate vocabulary; how to prepare the most common types of legal documents in an effective, clear, and persuasive manner (e.g., briefs, motions, pleadings, contracts, stipulations, declarations, determination letters, etc.); how to communicate in a persuasive fashion to influence the listener(s); available research sources, both printed and electronic, to complete legal research, including what types of material they contain, where they are located, and their breadth, depth, and relative strengths and weaknesses. Examples include primary legal texts, secondary legal texts, and electronic databases; how to prepare clear and effective formal correspondence to a variety of recipients; and how to use computers to create documents, conduct research, and communicate; and how to use a variety of software applications.

Skill in: Reading and comprehending written documents such as contracts, statutes, regulations, legal rulings, case law, etc; analyzing arguments in order to effectively address them; summarizing relevant facts in order to capture the key points and implications; determining relevant legal issues to be addressed; editing written documents for accuracy and effectiveness; identifying issues relevant to a question/matter given the available information and applicable law, in order to prioritize the critical elements to be addressed; ranking pending matters in order of importance to work effectively and meet deadlines without sacrificing the quality of work products; planning work within given time constraints, continually monitoring progress, and adjusting current work focus to meet deadlines; properly identifying the nature of problems, generating alternatives, and implementing solutions and approaches that successfully address the problems; efficiently locating relevant or useful information from a large volume of documents; behaving towards others with respect, courtesy, and tact to enhance communication and helping ensure a positive reputation for the department; communicating legal principles, facts, and position(s) in a logical, respectful, and articulate manner to various audiences and forums using tone, vocabulary, format, and grammar appropriate to the circumstances; using computer hardware and software to effectively communicate with others, access files, and produce written job-related documents; working cooperatively and productively as a member of a team to achieve a common goal; and presenting oneself in an appropriately professional manner in all circumstances.

Ability to: Analyze information and detect potential logical, legal, and/or factual flaws in arguments or assumptions; reason logically in order to research, investigate, and plan the development of a project or case; attend to details in order to perform work in an accurate and thorough manner; conceptualize large, long-term projects as a series of distinct tasks to prioritize them; recognize the merits in the opinions of internal and external stakeholders to reach a compromise; organize thoughts before communicating to ensure concise and logical expression; identify situations in which available information, resources, or capabilities are insufficient to complete work tasks in order to seek assistance when needed; work quickly in order to complete urgent projects assigned without prior notice; successfully complete multiple projects simultaneously (i.e., multi-task) within appropriate timeframes while maintaining a high level of work performance; and accept constructive criticism regarding work products and practices to continually improve work performance.

A greater degree of knowledge, skill, and abilities is required at each higher level.

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TAX COUNSEL III (SPECIALIST)

Knowledge of: In addition to the above, Department's policies regarding confidential taxpayer information; general principles of jurisprudence including statutory construction and stare decisis; legal principles and interpretive case law underlying the Internal Revenue Code, the California Revenue and Taxation Code, other applicable codes, and their supporting regulations; Federal and State Constitutions, Internal Revenue Code, the California Revenue and Taxation Code, other applicable codes, case law and their supporting regulations as they relate to the specific job assignment; and Department's sexual harassment policy.

Skill in: In addition to the above, organizing and making effective formal and informal presentations for various purposes and audiences (e.g., administrative hearings, Board Meetings, internal briefings, meetings, settlement negotiations, etc.); weighing the relative advantages and disadvantages of potential actions and determining the appropriate steps to take; understanding and explaining computations and schedules (e.g., penalty, interest, tax, etc.); and providing guidance, direction, and training to colleagues to ensure quality work products.

TAX COUNSEL III (SUPERVISOR)

Knowledge of: In addition to the above, knowledge of a manager's/supervisor's role in promoting Equal Employment Opportunity in hiring, employee development, and promotion; and the principles and techniques of personnel management and supervision.

Ability to: In addition to the above, effectively supervise the work of subordinate personnel; and effectively contribute to the Department's equal employment goals; and planning, organizing, and directing the work of others.

TAX COUNSEL IV

Knowledge of: In addition to the above, the Board's organization and procedures to effectively complete assignments.

Ability to: In addition of the above, apply legal principles and statutes across program areas and provide constructive criticism to improve work performance.

CLASS HISTORY

	Date Established	Date Revised	Title Changed
Tax Counsel	1/22/91	4/22/08	5/21/96
Tax Counsel III (Specialist)	1/22/91	4/22/08	5/21/96
Tax Counsel III (Supervisor)	1/22/91	4/22/08	5/21/96
Tax Counsel IV	2/1/94	4/22/08	5/21/96

Experience in the "practice of law" or "performing legal duties" is defined as (1) only that legal experience acquired after admission to any State Bar, or (2) experience as a judicial clerk for a Federal Court, California State Court, or another state's appellate court of last resort. For an individual's judicial clerkship to qualify as experience in the "practice of law" or "performing legal duties", the experience must have been gained after receipt of a Juris Doctor or equivalent degree.

SPEC: TAX SERVICE SPECIALIST
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code: LZ31
Class Code: 5850
Established:

1/19/83

Revised: --
Title Changed: --

TAX SERVICE SPECIALIST

DEFINITION

Under administrative direction, to direct a program of providing accurate and understandable information to the public concerning the tax laws, rules, and regulations administered by a tax agency; to advise top management on taxpayer communication and education needs; and to do other related work.

TYPICAL TASKS

Prepares and coordinates the preparation and use of articles for trade and professional journals, news releases, and other means of communication, explaining the application of taxes administered by a tax agency to educate and inform the public on tax matters; analyzes the extent of public understanding of complex tax laws and administrative procedures and determines the need for further education and knowledge; recommends the objectives and goals of a tax agency's communication pro grams; recommends methods and techniques for accomplishing such goals; evaluates the effectiveness of the program and recommends changes; pre pares, coordinates, and directs or works with line personnel in the preparation of a wide variety of communication devices including news releases, trade journals or pamphlets, magazine articles, departmental publications, forms, reports, speeches, and radio, television, and motion picture scripts; edits and coordinates written material including the annual report; develops and maintains maximum community understanding of the necessity for compliance in a self assessed tax program; cooperates with Federal agencies; develops special programs for attorneys, accountants, and other practitioners; prepares material adapted to the needs and interests of various groups concerned with tax compliance; promotes the knowledge and use of tax services; coordinates and evaluates the communications and education activities of field and headquarters staff; establishes and maintains cooperative working relations with those engaged in communications media; meets with top management and advises on the public impact of proposed actions; funnels pertinent information from outside sources into communication channels; directs the maintenance of press clippings and related records; may advise top management on the public impact of legislative and agency programs.

MINIMUM QUALIFICATIONS

Experience: Either

1. Three years of experience communicating financial information to the public; or

2. Broad and extensive experience (more than five years) which has demonstrated the ability to plan and direct a comprehensive public education and communications program. This must have included experience in preparing and disseminating information as well as responsibility for either direct or functional supervision of the writing of others. Writing experience (preferably in journalism), while an integral part of the above, will not be considered qualifying in itself. (Experience in the California state service applied toward this requirement must include at least three years with responsibility for a major aspect of a statewide communications program or for a communications program in a geographic area.)

and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

Knowledge of: Process of translating complex tax laws, rules, and regulations into lay terms; methods used to determine public needs for facts and guidance; methods of editing publications and forms; communications channels, methods, and procedures; California state revenue and taxation programs; department's affirmative action program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Encourage proper compliance with tax laws; anticipate industrywide tax problems and stimulate the development of answers and their dissemination to the public; organize and direct a statewide communications and education program; speak and write effectively; gain the confidence and respect of those contacted in the work; establish and maintain cooperative relations with the press and tax practitioners; organize and lay out printed materials; analyze situations accurately and take effective action; effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTICS

Ability to represent taxpayer interests in a technically oriented organization; demonstrated capacity for assuming progressively greater responsibility, emotional stability under stress; recognition of the public's need for assistance in understanding complex taxation procedures, and to effectively represent tax agency policies to the public.

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

TAX TECHNICIAN, BOARD OF EQUALIZATION
Series Specification
(Established September 7, 1993)

SCOPE

This series specification describes five Tax Technician classifications used in district and headquarters offices throughout the Board of Equalization. These classes perform a variety of paraprofessional, technical, and statistical work in support of the program functions of the Board of Equalization.

Schem Code	Class Code	Class
CX85	1973	Tax Technician I, Board of Equalization
CX86	1974	Tax Technician II, Board of Equalization
CX87	1975	Tax Technician III, Board of Equalization
CX89	1977	Supervising Tax Technician II, Board of Equalization
CX90	1978	Supervising Tax Technician III, Board of Equalization

DEFINITION OF SERIES

Positions allocated to this series are responsible for providing technical support for the Board's professional staff by being regularly required to apply laws, rules, and policies relating to Board of Equalization's programs. Incumbents will be required to learn, perform, and/or supervise work involving registration, maintenance, close-out, and security requirements of tax accounts and property statements; process escrow clearances and issue releases; provide advisory services to taxpayers and other governmental agencies; perform taxpayer interviewer duties; review and approve or deny routine claims for refund; adjust and verify statistical information and prepare reports; maintain and update maps; do set-up work for appraisers; estimate values of aircraft and vehicles; perform cashier duties; provide initial taxpayer contact on billings, delinquencies, and revocations of tax accounts; establish, clear, and control delinquencies of tax accounts; recommend liens or refunds and apply or refund unapplied credits, security, or citations; prepare complex adjustments to the accounts receivable system; review schedule type returns and allocate State, county, and local taxes; review, evaluate, and process security; and adjust billings and accounts receivable on petitioned cases.

FACTORS AFFECTING POSITION ALLOCATION

Variety, complexity, and difficulty of work; supervision received; type and frequency of contacts with other units, sections, agencies, and the public; the degree of independence and judgment required in making

determinations and the consequences of erroneous determinations serve as the major differentiating factors between classes. Additional considerations which enter into determination of borderline allocations include such things as the experience and knowledge necessary to perform the work.

DEFINITION OF LEVELS

TAX TECHNICIAN I, BOARD OF EQUALIZATION

This is the entry and first journey level of the series. Under close supervision, incumbents learn and perform the less difficult and complex technical work such as: registration, maintenance, close-out, and security requirements of tax accounts and property statements by remote entry; process escrow releases; and provide routine advisory services to taxpayers and other governmental agencies by phone or in writing. Positions allocated to this level may also learn and perform duties in the more varied and complex program areas.

TAX TECHNICIAN II, BOARD OF EQUALIZATION

This is the full journey level of the series. Positions allocated to this level are distinguished from positions at the first journey level in that incumbents perform the full range of duties under general supervision, exercise a higher degree of judgment and initiative than expected at the lower level and are responsible for the more complex technical duties. Incumbents may: perform the full range of taxpayer interviewer duties or tax return review and verification duties; review and approve or deny routine claims for refunds; perform registration, account maintenance and close-out duties for the special and property tax programs; process escrow clearances and issue release; adjust and verify statistical information and prepare reports; maintain and update maps; do set-up work for appraisers; estimate values of aircraft and vehicles; perform cashier duties; and provide advisory services to the public.

TAX TECHNICIAN III, BOARD OF EQUALIZATION

This is the advanced journey level of the series. Under general direction and with very little day-to-day supervision, incumbents serve as the expert staff resource responsible for the most difficult and complex technical duties. Incumbents may: provide the initial taxpayer contact on selected billings, delinquencies, and revocations of tax accounts and the less difficult collection cases; serve in a lead capacity over lower level Tax Technicians performing taxpayer interviewer duties; establish, clear, and control delinquencies of tax accounts; recommend liens or refunds and apply or refund unapplied credits, security, or citations; prepare complex adjustments to the accounts receivable system; review schedule type returns for transfers and questionable funding and allocate funds to State, county, local, and transit district; review, evaluate, and process security; adjust billings and accounts receivable on petitioned cases; establish and maintain control on the proper filing of property statements; and recommend the granting of extensions of time or impose penalties.

SUPERVISING TAX TECHNICIAN II, BOARD OF EQUALIZATION

This is the first supervisory level in the class series. Incumbents either plan, organize, and direct the work: (1) of a small group (3-11) comprised primarily of Tax Technicians II and may personally

perform the most difficult work; or (2) as a full supervisor may supervise a small group (3-11) comprised of Tax Technicians I and II performing a variety of program functions; or (3) as a full supervisor, may supervise a medium size group (9-14) comprised primarily of Tax Technicians I and II; and select and train employees.

SUPERVISING TAX TECHNICIAN III, BOARD OF EQUALIZATION

This is the second supervisory level in the class series. Incumbents either plan, organize and direct the work: (1) through subordinate supervisors, a large group (12-20) comprised of primarily Tax Technicians I and II or (2) of a small group (3-11) of primarily Tax Technicians III; and select and train employees.

MINIMUM QUALIFICATIONS

TAX TECHNICIAN I, BOARD OF EQUALIZATION

Either I

In the California state service, either: (a) six months of experience performing the duties at a level of responsibility not less than that of an Office Assistant; or (b) one year of experience performing the duties of an Assistant Clerk.

Or II

Education: Either equivalent to completion of the 12th grade; or completion of a business school curriculum; or completion of a clerical work experience training program such as those offered through the Welfare Reform Act. (One year of clerical work experience may be substituted for the required education.)

TAX TECHNICIAN II, BOARD OF EQUALIZATION

Either I

In the California state service, either: (a) six months of experience performing the duties of a Tax Technician I, Board of Equalization, Range B; or (b) one year of experience performing the duties at a level of responsibility not less than that of Tax Technician, Board of Equalization, Range A, which provides a familiarity with the various programs administered by the Board of Equalization.

Or II

Two years of experience in a governmental or private agency performing duties which provide a basic familiarity with the regulations and policies governing the various tax programs administered by the Board of Equalization. (Experience in California state service applied toward this requirement must include at least one year in a class with a level of responsibility not less than that of Tax Technician I, Board of Equalization, Range A, which provides a familiarity with the various tax programs administered by the Board of Equalization.)

TAX TECHNICIAN III, BOARD OF EQUALIZATION

Either I

In the California state service, either: (a) one year of experience performing the duties of a Tax Technician II, Board of Equalization; or (b) 18 months performing the duties of a Tax Technician I, Board of Equalization, Range B.

Or II

Three years of experience in a governmental or private agency performing duties which provide knowledge of the laws, rules, and regulations pertaining to the tax programs administered by the Board of

Equalization. (Experience in the California state service applied toward this requirement must include one year in a class with a level of responsibility not less than Tax Technician II, Board of Equalization.)

SUPERVISING TAX TECHNICIAN II, BOARD OF EQUALIZATION

Either I

In the California state service, either: (a) one year of experience performing the duties of a Tax Technician II, Board of Equalization; or (b) 18 months of experience performing the duties of a Tax Technician I, Board of Equalization, Range B.

Or II

Three years of experience in a governmental or private agency performing duties which provide knowledge of the laws, rules, and regulations pertaining to the various tax programs administered by the Board of Equalization. (Experience in the California state service applied toward this requirement must include one year in a class with a level of responsibility not less than a Supervising Tax Technician II, Board of Equalization.)

SUPERVISING TAX TECHNICIAN III, BOARD OF EQUALIZATION

Either I

In the California state service, either: (a) one year of experience performing the duties of a Supervising Tax Technician II, Board of Equalization, or a Tax Technician III, Board of Equalization; or (b) two years of experience performing the duties of a Tax Technician II, Board of Equalization.

Or II

Four years of experience in a governmental or private agency performing duties which provide knowledge of the laws, rules, and regulations pertaining to the various tax programs administered by the Board of Equalization. (Experience in the California state service applied toward this requirement must include one year in a class with a level of responsibility not less than Supervising Tax Technician II, Board of Equalization.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Modern office methods and procedures; business terminology as it relates to the tax programs administered by the Board of Equalization; rules, regulations, general organization, and procedures of the Board of Equalization; grammar, spelling, punctuation, and modern English usage; and arithmetic.

Ability to: Communicate at a level required for successful job performance; perform mathematical computations; apply laws, rules, and regulations; interpret and use reference material; follow instructions; use tact and good judgment in dealing with fellow employees, the public, and other governmental entities; interpret written and numerical data; learn to utilize personal computer systems and software applications in the performance of technical work; communicate effectively over the telephone and in person; accept increasing responsibility; and be flexible and adapt to changes in procedures

and/or workload.

TAX TECHNICIAN II, BOARD OF EQUALIZATION

Knowledge of: All of the above, and a working knowledge of the laws, rules, regulations, policies, and procedures administered by the Board of Equalization.

Ability to: Perform all of the above, and apply and interpret well-defined sections of the laws, rules, and regulations governing the various tax programs administered by the Board of Equalization; recognize questions and/or situations outside of the employee's area of responsibility or knowledge and refer them to the appropriate person(s); independently research problems and take or recommend action; function effectively under pressure; and work independently.

TAX TECHNICIAN III, BOARD OF EQUALIZATION

Knowledge of: All of the above, and in-depth knowledge of the laws, rules, regulations, policies, and procedures administered by the Board of Equalization.

Ability to: Perform all of the above and apply well-defined sections of the laws, rules, regulations, policies, and procedures administered by the Board of Equalization; accept increasing responsibility; be flexible and adapt to changes in procedures and/or workload; function effectively under pressure; recognize questions and situations outside area of responsibility and refer them to the appropriate persons; serve in a lead capacity in advising and training less experienced and knowledgeable staff; work independently with minimal direction; and accept increasing responsibility for difficult and complex work and for accuracy and thoroughness in completed work.

SUPERVISING TAX TECHNICIAN II, BOARD OF EQUALIZATION
SUPERVISING TAX TECHNICIAN III, BOARD OF EQUALIZATION

Knowledge of: All of the above; principles of effective supervision; supervisory responsibilities under the State Employer/Employee Relations Act; the Board of Equalization's Affirmative Action Program objectives; a supervisor's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: Perform all of the above and plan, organize, direct, and evaluate the work of subordinate staff; assess the training needs of subordinates; develop staff; establish and maintain cooperative working relationships with those contacted during the course of the work; communicate effectively; effectively participate as a member of the management team; understand and fulfill supervisory responsibilities under the State Employer/Employee Relations Act; and effectively contribute to the Board's affirmative action objectives.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed

Tax Technician I, Board of Equalization	9/7/93	9/20/06	--
Tax Technician II, Board of Equalization	9/7/93	9/20/06	--
Tax Technician III, Board of Equalization	9/7/93	9/20/06	--
Supervising Tax Technician II, Board of Equalization	9/7/93	9/20/06	--
Supervising Tax Technician III, Board of Equalization	9/7/93	9/20/06	--

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SPEC: TRAINING OFFICER
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

TRAINING OFFICER
Series Specification
(Established December 19, 1968)

SCOPE

Classes in this series are used to direct training activities for State agencies and perform related staff work. Training goals are achieved through consultation, program design, and direct conduct of training courses and conferences. Typical training programs include top and middle management development, comprehensive supervisory training, individual employee development plans, professional and technical training, specialized training, and comprehensive orientation programs.

FACTORS AFFECTING POSITION ALLOCATION

Scope of training responsibility, complexity of work, independence of action and decision, supervision given and received, size of subordinate staff, and size of the client group. The size of staff and client group (indicated in relative terms, such as small or large) are not considered an absolute criterion in allocating positions. Where staff size is small, greater emphasis is placed on the scope and complexity of the training program. Other factors which enter into level determination are the existence of or management support for training programs, variety of agency programs including continuing organization and program change, geographical dispersion, and variety of occupational groups served.

Schem Code	Class Code	Class
LC30	5197	Training Officer I
LC25	5194	Training Officer II
LC20	5196	Training Officer III

ENTRY LEVELS

Entry into this series is typically through either the Staff Services Analyst class or other disciplines which provide experience in the training field.

DEFINITION OF LEVELS

TRAINING OFFICER I

Under general direction, either (1) in a small department to plan, organize, and conduct training programs of average complexity; or (2) in a large department, to organize, develop, coordinate, and conduct a major segment of a complex training program. Training Officer I positions perform the more responsible, varied and

difficult training work and are assigned full journeyperson responsibilities requiring independence of action. Positions in this class may act as leadperson.

TRAINING OFFICER II

Under general direction, either (1) in a medium-sized department with a training program of average complexity, to plan, organize and conduct the total departmental program; or (2) in a large department, under the direction of a higher level Training Officer, to supervise a training unit responsible for a major segment of a complex training program. Training Officer II positions perform the most sensitive and difficult work and supervise a training staff.

TRAINING OFFICER III

Under general direction, either (1) in a large department with a complex and diverse training program to plan, organize, and conduct the total departmental training program; or (2) in the largest departments under general direction of a higher level Training Officer to plan, direct, organize, and review the work of a large group of trainers performing a variety of complex training functions. This type of assignment is possible only in the most complex and largest training programs.

Training Officer III positions serve as direct consultants to top management on training matters and provide program direction and consultation of the most sensitive and complex nature.

MINIMUM QUALIFICATIONS

TRAINING OFFICER I

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements, provided that the combined qualifying experience totals at least 30 months. Education may not be used to reduce this 30-month limit.

Either I

One year of experience in the California state service performing the duties of a Staff Services Analyst, Range C. (Persons applying experience toward this pattern must have had an assignment in California state service planning, organizing, conducting and evaluating employee training programs in a variety of subjects.)

Or II

Experience: Three years of experience in planning, organizing, conducting, and evaluating employee training programs covering a variety of subjects. (Experience in California state service applied toward this pattern must include one year of experience performing duties comparable in level of responsibility to those of a Staff Services Analyst, Range C.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

(Promotional candidates who are within six months of satisfying the

experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.)

TRAINING OFFICER II

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements.

Either I

In the California state service, (1) one year of experience performing the duties of a Training Officer I or Personnel Training Consultant; or (2) one year of experience performing duties of a class comparable in level of responsibility to those of Training Officer I in technical or administrative personnel work which includes responsibility for planning, directing, and evaluating training programs.

Or II

Experience: Four years of experience in planning, organizing, and directing employee training programs covering a variety of subjects. (Experience in California state service applied toward this requirement must include at least one year performing duties comparable in level of responsibility to those of Training Officer I.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

TRAINING OFFICER III

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements.

Either I

In the California state service, either (1) one year of experience performing the duties of a Training Officer II, or (2) two years of experience performing the duties of a Training Officer I or Personnel Training Consultant or (3) two years of experience performing duties comparable in level of responsibility to those of Training Officer I in technical or administrative personnel work which includes responsibility for planning, directing, and evaluating training programs.

Or II

Experience: Five years of experience in planning, organizing, and directing employee training programs covering a wide variety of subjects. At least one year of this experience shall have included responsibility for supervision of professional trainers. (Experience in California state service applied toward this requirement must include at least one year performing duties comparable in level of responsibility to those of Training Officer II or two years performing duties comparable in level of responsibility to those of Training Officer I.) (One year of graduate work in public or business administration, industrial relations, psychology, or a related field may be substituted for six months of the required general nonsupervisory training experience.) and

Education: Equivalent to graduation from college. (Additional

qualifying experience may be substituted for the required education on a year-for-year basis.)

KNOWLEDGE AND ABILITIES

ALL LEVELS:

Knowledge of: Principles and methods of employee training, counseling, and group leadership; training resources and equipment; analytical and statistical methods; principles of verbal and written expression; principles of public administration.

Ability to: Plan, organize, conduct, and evaluate training programs; analyze data and situations accurately and adopt an effective course of action; speak, write, and lead conferences effectively.

TRAINING OFFICER II
TRAINING OFFICER III

Knowledge of: All of the above, and principles and techniques of planning and directing long-range comprehensive management development and training programs; public organization and management theory; methods and sources of financing training programs; and principles and techniques of supervision and administration; department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and direct and supervise others in training or related functions; effectively and creatively develop and utilize management and organization resources toward comprehensive long-range training programs; effectively represent management development and training before governmental executives, legislators, and private industry representatives.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Training Officer I	5/21/54	12/19/79	--
Training Officer II	12/19/68	12/19/79	--
Training Officer III	9/28/46	12/19/79	12/19/68

SPEC: WAREHOUSE WORKER

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	PB20
Class Code:	6220
Established:	2/1/62
Revised:	5/20/86
Title Changed:	4/24/74

WAREHOUSE WORKER

DEFINITION

Under supervision, to perform journeyperson work in the receipt, storage, inventory, and issue of materials; to use powered or nonpowered materials handling equipment as necessary; may instruct, lead or supervise inmates, wards or resident workers; and to do other related work.

TYPICAL TASKS

Loads and unloads trucks, freight cars, or other common carriers and transports material to specified areas either by hand or by use of powered or nonpowered materials handling equipment; assists in the receiving, unpacking, and checking of incoming material against invoices or bills of lading to verify items and quantities received; palletizes, tags, and moves material to designated locations; stocks and restocks shelves, bins, or other storage facilities; pulls, repalletizes, and assists in the preparation of material for local issue or shipment; selects specified items and assembles material in shipping bays; maintains simple records; keeps floors and storage areas clean and orderly; as assigned, may occasionally operate motor vehicles.

MINIMUM QUALIFICATIONS

Possession of a Class III California driver license valid for the operation of any two-axle single-motor vehicle and one towed vehicle (i.e., a trailer with a gross weight of 6,000 pounds or less).*

and

Either I

One year of experience in the California state service performing the duties of a Service Assistant (Warehouse and Stores).

Or II

One year of experience assisting in the receipt, storage or issue of materials from a centralized stockroom or warehouse.

(*Applicants who do not possess the license will be admitted to the examination, but must secure the license prior to appointment.)

KNOWLEDGE AND ABILITIES

Knowledge of: Methods, practices, and equipment used in receiving,

storing, and shipping material and supplies; methods of packing and unpacking material and supplies; common forms and documents used in receiving and shipping departments of a governmental or commercial organization; operation of forklift trucks and other types of materials handling equipment; methods of taking inventories and maintaining simple inventory records.

Skill in: Operation of powered materials handling equipment.

Ability to: Read and write English at a level required for successful job performance; make accurate computations relating to warehouse work; follow instructions.

SPECIAL PERSONAL CHARACTERISTICS

Neatness and willingness to do heavy manual labor in either indoor or outdoor storage areas.

ADDITIONAL DESIRABLE QUALIFICATION

Equivalent to graduation from high school.

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SPEC: WORD PROCESSING TECHNICIAN

CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

WORD PROCESSING TECHNICIAN Series Specification
(Established June 8, 1977)

SCOPE

This series specification describes two classes in the California state service that are primarily concerned with the operation of electronic text editing equipment in the production of a variety of typed copy for a majority of the time.

Those positions requiring only occasional use of electronic text editing equipment, those requiring only the performance of routine, repetitive typing tasks without the requirement to revise or combine variables, or those that do not require the origination and revision of copy as a major portion of the job are not allocated to these classes.

Schem Code	Class Code	Class
CC85	1181	Word Processing Technician
CC80	1213	Senior Word Processing Technician

DEFINITION OF SERIES

Word Processing Technicians are distinguished from other clerical classes by being regularly required to operate on a full-time basis electronic text editing equipment. The characteristic feature of these machines is the ability to record, revise and store information on some form of magnetic media for variable output. Duties include: entering information via a keyboard into electronic text editing equipment from mechanical dictation, written or edited copy; identifying, processing, storing, and retrieving information on magnetic discs, tapes or cards; proofreading both submitted raw data and information already keyed into the processor and making required corrections in spelling, grammar, and punctuation; formatting submitted material; playing out onto appropriate paper or form to produce desired hard copy; recording internal statistical data or other information necessary to develop charges to clients, and to measure the performance of the unit and operators; communicating with clients of the unit to resolve problems, receive instructions, or report on job progress; checking documents for completeness, accuracy and compliance with departmental, legal, and other requirements; and following complex written and verbal instructions.

FACTORS AFFECTING POSITION ALLOCATION

Level of difficulty, variety, complexity of assigned duties; independence of action and decisions; supervision received and degree of supervision exercised serve as differentiating factors between classes.

DEFINITION OF LEVELS

WORD PROCESSING TECHNICIAN

This is the entry and journey level for this series. Under general supervision and in accordance with approved procedures and precedents, incumbents perform a variety of word processing duties. Work at this level involves typing memorandums, correspondence, reports, graphs, charts, and tables which require revisions to stored material. There may be lead responsibility over others.

SENIOR WORD PROCESSING TECHNICIAN

This is the working supervisor level for this series. Under general direction incumbents either (1) supervise the work of a small word processing unit and personally perform the most difficult work, or (2) assist in the supervision of a medium-size or large word processing center.

MINIMUM QUALIFICATIONS

WORD PROCESSING TECHNICIAN

Either I

In the California state service one year of experience performing the duties of an Office Assistant I (Typing) (formerly Clerk Typist I).

Or II

One year of typing and clerical work.

SENIOR WORD PROCESSING TECHNICIAN

Either I

In the California state service one year of experience performing the duties of a Word Processing Technician, Range B.

Or II

Thirty months of experience in typing and clerical work, at least 18 months of which shall have been operating an electronic text editing machine in difficult typing, transcribing, and revising of various correspondence and reports.

KNOWLEDGE AND ABILITIES

WORD PROCESSING TECHNICIAN

Knowledge of: Correct punctuation, spelling and grammatical usage; modern office methods, supplies and equipment.

Ability to: Learn and interpret machine responses; learn basic transcription from machine dictation; learn and apply office policies, rules, regulations and procedures; perform sustained typing at a speed accuracy rate of at least 50 words per minute; make simple arithmetic computations; follow difficult oral and written directions and work under pressure to meet production deadlines.

SENIOR WORD PROCESSING TECHNICIAN

Knowledge of: All of the above, and the operation, care and use of an electronic text editing machine and related equipment; principles of effective supervision; the Department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and transcribe difficult machine dictation; work with confidential subject matter; produce a large volume of accurate, high quality special projects; supervise a small word processing center; effectively contribute to the department's affirmative action objectives.

SPECIAL PERSONAL CHARACTERISTICS

BOTH LEVELS:

Willingness to work effectively and agreeably under the pressure of short lead times in a production-oriented environment; accept responsibility for accuracy of work; and work in a noisy environment.

CLASS HISTORY

Class	Date Established	Date Revised	Title Changed
Word Processing Technician	6/8/77	--	--
Senior Word Processing Technician	6/8/77	--	--

ALTERNATE RANGE CRITERIA

These criteria will be used to allocate incumbents to Alternate Range A or Range B.

Range A. This Range shall apply to incumbents who do not meet the criteria for payment in Range B.

Range B. This Range shall apply to persons who have satisfactory completed the equivalent of six months of Word Processing Technician, Range A, experience or have six months of varied experience in operating an electronic text editing machine with the ability to record, revise, and store information on some form of magnetic media for variable output.

When the requirements for movement to Range B are met and upon recommendation of the appointing power, the employee shall receive the rate of Range B, under provisions of State Personnel Board Rule 98.3 and a new salary adjustment anniversary date will be established.

SPEC: YOUTH CORRECTIONAL COUNSELOR
CALIFORNIA STATE PERSONNEL BOARD

SPECIFICATION

Schematic Code:	XS10
Class Code:	9581
Established:	7/7/66
Revised:	6/18/02
Title Changed:	9/1/98

YOUTH CORRECTIONAL COUNSELOR

DEFINITION

Under supervision, in a Department of the Youth Authority facility (institution, camp, drug treatment center, or special community program), is responsible and accountable for the counseling, supervision, and custody of an assigned group of youthful offenders; analyzes, organizes, and records casework information necessary for treatment and parole planning; and does other related work.

TYPICAL TASKS

Directs, counsels, and supervises youthful offenders in their daily living and activity programs; maintains living unit custody and necessary discipline which may include verbal commands, and physical, mechanical, or chemical restraint of out-of-control youthful offenders; responds to emergencies, escapes, and disturbances as directed; develops and implements constructive activity programs for periods of time when youthful offenders are not in an academic or vocational work program; provides a planned, scheduled, casework program of individual and small group counseling for an assigned case load of approximately ten (10) to twelve (12) youthful offenders; assists in the classification of assigned youthful offenders for purposes of assuring appropriate placement on a living unit, in a work experience or academic/vocational training program, or for other special programmatic needs; participates in large group counseling sessions on the living unit conducted during work shift; communicates and coordinates with other facility staff regarding observations and conclusions resulting from work with assigned youthful offenders; prepares written progress evaluations, treatment summaries, and other reports required by the Department and the Youthful Offender Parole Board; implements treatment plans developed by the treatment team to which assigned; presents diagnostic and treatment information about assigned youthful offenders at scheduled case conferences; assists in planning and carrying out programs of education, recreation, intramural sports, community service projects, victim awareness, and other activities; involves volunteers in program activities on a planned, regular basis, and maintains appropriate volunteer records; may work with the Free Venture Coordinator of the facility to screen/refer youthful offenders as appropriate; trains and oversees youthful offenders in cleanliness, personal care, and grooming; operates electronic word and data processing systems for information input and retrieval; participates in in-service training sessions; orders materials and supplies necessary for the operation of the unit. At a youth conservation fire camp, works cooperatively with staff of law enforcement and fire suppression departments as

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necessary; operates a motor vehicle as necessary; and supervises youth conservation fire camp activities of a group of youthful offenders.

MINIMUM QUALIFICATIONS

Either I

Experience: One year of experience in the California state service performing duties of a peace officer and maintaining the security, custody, and supervision of adult or youthful offenders in a correctional facility.

Or II

Education: Equivalent to graduation from a four-year college or university. (Registration as a senior in an accredited college or university will admit applicants to the examination, but applicants must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

Or III

Equivalent to completion of two years (60 semester units) of college and two years of experience working with youth in one or a combination of the following:

1. Youth correctional agency.

2. Parole or probation department.

3. Family, children, or youth guidance center.

4. Juvenile bureau of law enforcement.

5. Education or recreation agency.

6. Mental Health Facility.

KNOWLEDGE AND ABILITIES

Knowledge of: The mission of the Department of the Youth Authority; the impact of community, social, and environmental conditions which contribute to delinquent behavior; principles and techniques of individual and group counseling and guidance of youthful offenders; techniques for the development of socially acceptable and responsible behavior in youthful offenders.

Ability to: Effectively communicate at a level necessary for successful performance on the job; interpret and follow instructions and departmental policies and procedures; apply the principles and techniques of individual and group counseling and guidance of youthful offenders; gain the interest, respect, and cooperation of other facility personnel, youthful offenders, and the public; maintain custody and impose fair and firm discipline; plan and conduct recreational activities; act independently and make decisions; analyze situations accurately and take effective action; think and act quickly in emergencies; accept and use supervisory direction and consultation constructively; learn electronic word and data processing systems for information input and retrieval.

SPECIAL PERSONAL CHARACTERISTICS

Emotional maturity and stability; demonstrated leadership ability;

empathetic and objective understanding of the problems of youthful offenders in custody; honesty; integrity; tact; patience; high moral standards; neat personal appearance; keenness of observation; continuing satisfactory record as a law-abiding citizen; willingness to work impartially with and accept the various racial, ethnic, and cultural differences of the youthful offenders in custody; punctuality and willingness to work various shifts, including weekends and holidays, and to report for duty at any time emergencies arise; sound physical, mental, and emotional condition; strength, endurance, and agility necessary to meet the demands of the job; corrected distance visual acuity of 20/20 or better in each eye; an uncorrected distance visual acuity of 20/60 or better in each eye; ability to pass the Farnsworth D-15 color vision test (normal color vision or only a mild to moderate color vision deficiency) and a peripheral field of view of at least 120 degrees of horizontal extent and 100 degrees of vertical extent, with no evidence of scotomas (nonseeing areas) within the full visual field of each eye; and hearing sufficient to meet the demands of the job.

DESIRABLE QUALIFICATIONS

Possession of a valid driver license; a commercial driver license is necessary for persons performing youth conservation fire camp or transportation officer duties.

AGE LIMITATION

Minimum age for appointment is 21 years of age.

PEACE OFFICER STANDARDS

Education Requirement: Pursuant to Government Code Section 1031(e), be a high school graduate, pass the General Education Development Test indicating high school graduation level, pass the California High School Proficiency Examination, or have attained a two-year or four-year degree from an accredited college or university. The high school shall be either a United States public school meeting the high school standards set by the State in which it is located, an accredited United States Department of Defense high school, or an accredited nonpublic high school. Any accreditation required by this paragraph sha11 be from an accrediting association recognized by the Secretary of the United States Department of Education. This subdivision shall not apply to any public officer or employee who was employed, prior to the effective date of the amendment of this section made at the 1971 Regular Session of the Legislature, in any position declared by law prior to the effective date of that amendment to be peace officer positions.

Citizenship Requirement: Pursuant to Government Code Section 1031(a), in order to be a peace officer, a person must be either a U.S. Citizen or be a permanent resident alien who is eligible for and has applied for U.S. Citizenship. Any permanent resident alien who is employed as a peace officer shall be disqualified from holding that position if his/her application for citizenship is denied.

Felony Disqualification: Pursuant to Government Code Section 1029, persons convicted of a felony are disqualified from employment as peace officers except as provided under Welfare and Institutions Code, Division 2, Chapter 3, Article 8, Section 1179(b), or Division

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2.5, Chapter 1, Article 4, Section 1772(b). Except as provided for by these statutes, persons convicted of a felony are not eligible to compete for, or be appointed to, positions in this class.

Firearm Conviction Disqualification: Anyone who is restricted for employment-related purposes from accessing, possessing, carrying, receiving, or having under his/her control a firearm or ammunition under all applicable State or Federal laws is ineligible for appointment to any position in this classification.

Background Investigation: Pursuant to Government Code Section 1029.1, persons successful in peace officer examinations shall be required to undergo a thorough background investigation prior to appointment. Persons who have previously undergone a Youth Authority background investigation may be required to undergo only a partial background investigation.

Medical Requirement: Pursuant to Government Code Section 1031, persons appointed to a peace officer class shall undergo a medical examination to determine that he or she can perform the essential functions of the job safely and effectively.

Drug Testing Requirement: Applicants for positions in this class are required to pass a drug-screening test. (The drug-screening test will be waived for employees who are currently in a designated "sensitive" class for which drug testing is required under State Personnel Board Rule 213.)

Training Requirements: Under provisions of Penal Code Section 832, successful completion of a training course in laws of arrest, search and seizure, and in firearms and chemical agents is a requirement for permanent status in this classification.