

COUNTY OF SOLANO

ESTATE INVENTORY SPECIALIST

Est. 01/07

DEFINITION

Under general direction inventories, packs, transports, stores and releases personal property that is under the jurisdiction of the Public Administrator/Public Guardian/Public Conservator's Office in compliance with the Probate Code, Welfare and Institutions Code, and County Policies and Procedures; to prepare and/or arrange for personal property appraisals; to maintain records and documentation of inventory processed.

CLASS CHARACTERISTICS

This is a journey level clerical classification assigned to perform responsible duties in the processing and preservation of personal property under the jurisdiction of the public administrator/public guardian/public conservator's office. Incumbents initially work under immediate supervision, progressing to general supervision as the incumbent becomes able to independently perform the full range of duties associated with this class. Employees are expected to learn to perform work that requires accomplishing assigned field duties, and to provide assistance and coordination to other departmental and agency staff in the course of the work. Work is supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedure are explained as they arise.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from Supervisory Staff.

Exercises no supervision.

EXAMPLES OF DUTIES -Duties may include but are not limited to the following:

Arranges for professional appraisals of client real and personal property based on programs procedures; places high value items in the safe or other secure area for safekeeping; participates in assigning appraised value to inventoried personal property items using reference sources and guides to estimating market value and present condition.

Establishes and maintains inventory records and/or automated record keeping systems including but not limited to descriptions of real and personal property under the jurisdiction of the public administrator's office to comply with Probate Code for Superior Court; may operate computerized inventory documentation systems; researches problems related to property accounting.

Works with Central Services surplus and real state agencies to sell clients' real or personal property in compliance with policies and procedures; discards or donates property which is ruined or of no value following probate code procedures.

Receives and screens callers, both in person and over the phone; evaluates described problems and responds to inquiries regarding departmental services or official documents and notices; refers callers to appropriate individuals and/or offices; provides the public and employees with general procedural and/or specific information regarding department, program or services; distributes and explains forms or requests; verifies identity of individuals; contacts outside agencies to verify information and resolve discrepancies.

Develops, receives and processes documents and information; determines routing of information, correspondence, service requests, records and documents based on content and knowledge of unit operations and established procedures.

Sorts, wraps, packs and otherwise prepares items for moving; prepares property for warehouse storage; arranges to load, unload, transport and move property; receives, releases, checks and accounts for property transferred to or from movers, auctioneers, heirs, families, clients and others; coordinates with movers for contract moving and storage; arranges for movement of vehicles and boats, trailers and equipment to storage; coordinates with other county offices, the public and others regarding property; prepares, maintains and/or distributes a variety of records and documentation related to property inventory, processing, releases, claims, ownership, and related.

Explains policies to persons involved with property being stored; guides, advises or explains the functions of the department, work unit or program; may provide assistance, training or instruction to help people understand and learn their duties and responsibilities with respect to the functional usage of forms, documentation, equipment, supplies or materials.

Retrieves information from County files and documentation; verifies accuracy of the information to be distributed; verifies information to determine whether documents have been mailed and/or distributed to appropriate parties; performs research to identify needed documents or to verify receipt of documents.

Performs data entry into specialized computer systems used to track and log various County records activities and programs; retrieves information from these specialized computer systems upon request; uses a variety of software applications (e.g., word processors, databases, spreadsheets, presentations) to complete work..

JOB RELATED AND ESSENTIAL QUALIFICATIONS

Knowledge of:

Market value of new or used business or household items; descriptive vocabulary for inventory and description of property.

Methods and techniques of property packing, transport and storage.

Safe working practices including techniques of lifting.

Computer and software programs used for spreadsheets, word processing, and data storage; modern office practices including filing and record keeping.

Arithmetic operations including addition, subtraction, multiplication, division and percentages.

Rules, regulations and operating procedures governing activities of the assigned unit/program.

Skills to:

Utilize basic office equipment, computer programs and various types of office supplies, materials, equipment and machinery.

Ability to:

Compile and maintain comprehensive records, logs and indices; accurately transfer information from one source to another; write clear, concise descriptions of items.

Estimate the value of property items based on auction or similar values, or using specialty item guidebooks.

Add, subtract, multiply and divide in various units of measure.

Apply knowledge of policies, procedures and activities specific to assigned unit/program understand, interpret and explain laws, regulations and policies governing program operations; understand program objectives in relation to departmental goals and procedures

Solve problems encountered in the course of work by choosing between procedural alternatives; organize and prioritize work assignments; make decisions and independent judgments; project consequences of decisions.

Communicate effectively and tactfully with people of diverse socio-economic backgrounds and temperaments in emotional situations; refer clients to services related to unit activities provided by other units, departments and agencies.

Establish and maintain cooperative working relationships.

Maintain confidentiality of information.

EXPERIENCE AND EDUCATION/TRAINING:

Experience:

Six (6) months of full-time work experience in basic inventorying, transporting, storing household items, personal property or commercial goods, maintaining related records and personal/real property appraisal.

Education/Training:

High school diploma or GED

SPECIAL REQUIREMENTS

None required.

SUPPLEMENTAL INFORMATION

Independent travel is required; requires possession of or ability to obtain a valid Class C California driver's license.

Positions allocated to this class require the ability to learn specific knowledge related to the department, division or program.

ADA COMPLIANCE

Physical Ability: Tasks involve the regular and, at times, sustained performance of moderately physically demanding work, typically involving some combination of climbing and balancing, stooping, kneeling, crouching, and crawling, and that may involve the lifting, carrying, pushing, and/or pulling of moderately heavy objects and materials (20-60 pounds). Some tasks may require extended periods of time at a keyboard.

Sensory Requirements: Some tasks require visual and sound perception and discrimination. Some tasks require oral communications ability.

Environmental Factors: Tasks may risk exposure to dust, temperature extremes, wetness/humidity and to substandard living areas including animal waste, vermin, odors and other contaminants.

DONALD W. TURKO
Director of Human Resources

Established Date: January 2007
BOS Date: February 13, 2007
CSC Date: January 2007