

## **OFFICE SPECIALIST**

### **DEFINITION**

Under general supervision, provides a variety of responsible and difficult office support activities to an assigned Town department, which may include word processing, data entry and organization, telephone and counter reception, processing invoices, record keeping, report preparation, and filing; provides information and assistance to the general public; and performs related work as required.

### **SUPERVISION RECEIVED AND EXERCISED**

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

### **CLASS CHARACTERISTICS**

This is a journey-level class that performs the full range of advanced and difficult clerical and office support duties, including document preparation, record keeping, compiling and organizing information from various sources, taking and transcribing minutes, assisting in department-related projects and programs, screening phone calls, visitors, and mail, and directing questions to the appropriate staff. Positions receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the department. This class is distinguished from the Office Assistant in that the latter works under direct supervision and performs less advanced clerical and office support duties.

### **EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)**

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Performs a wide variety of complex and difficult clerical duties to support departmental operations, including filing, preparing records and monthly reports, processing business license, public works, and building permit applications, scheduling inspections, accounts receivable, cashiering duties, creating project files, and preparing, coding, and processing invoices.
- Maintains accurate and detailed records, verifies accuracy of information, researches discrepancies, and records information.
- Verifies and reviews forms and reports for completeness and conformance with established regulations and procedures; applies departmental and program policies and procedures in determining completeness of applications, records, and files.
- Prepares, copies, collates, and distributes a variety of documents, including City Council, board, and committee agendas and packets, bid packages, purchase orders, contracts, and service agreements; ensures proper filing of copies in departmental or central files.
- Screens calls, visitors, and incoming mail; assists the public at front counter and directs public to appropriate locations and/or staff; responds to complaints and requests for information; assists in interpreting and applying regulations, policies, procedures, systems, rules, and precedents in response to inquiries and complaints from public; directs callers to appropriate Town staff as necessary.
- Composes, types, formats, and proofreads a wide variety of routine and complex reports, letters, documents, flyers, brochures, calendars, and memoranda; types from rough drafts, verbal instructions, or transcribing machine recordings; checks drafts for punctuation, spelling, and grammar; suggests

- corrections.
- Operates full-service post office including selling and ordering postal supplies, preparing mail and packages for delivery, and explaining policies and procedures to customers.
  - Receives, opens, time stamps, sorts, and distributes incoming and interdepartmental mail; prepares and distributes outgoing mail.
  - Performs cashiering duties; receives money and issues receipts; collects and accounts for service fees; balances cash receipts; provides reports to the Finance Department.
  - Compiles information and data for administrative, statistical, and financial reports; checks data; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
  - Maintains and updates departmental record systems and specialized databases; enters and updates information with departmental activity, inventory files, and report summaries; retrieves information from systems and specialized databases as required.
  - May serve as administrative support to a board, commission, or committee, including scheduling meetings, reserving meeting rooms, preparing and distributing agenda packets, attending meetings, taking, formatting, and distributing minutes, and following-up on decisions as required.
  - Assists in assigned department projects and/or programs as assigned by management staff; provides assistance to department staff in various research and department-related projects.
  - Gathers, assembles, updates, and distributes a variety of department or Town specific information, forms, records, and data as requested.
  - Monitors and orders office and other related supplies; assists in preparing, processing, and tracking purchase requisitions for services and materials; receives vendor invoices; prepares requests for payment for management approval.
  - Acts as a department representative within community groups to relay or obtain relevant information regarding departmental activities.
  - Serves as back up support for other office and technical positions, including Permit Technician.
  - Performs other duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Modern office practices, methods, and computer equipment and applications, including word processing, database, and spreadsheet applications.
- Departmental practices and procedures and applicable Town policies.
- Principles and practices of data collection and report preparation.
- Business letter writing and the standard format for reports and correspondence.
- Principles and procedures of cash handling.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and Town staff.

### **Ability to:**

- Perform responsible clerical support work with accuracy, speed, and minimal supervision.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Interpret and apply administrative and departmental policies and procedures.
- Compose correspondence and reports independently or from brief instructions; maintain records and databases.
- Make accurate arithmetic computations.
- Understand the organization and operation of the Town as necessary to assume assigned responsibilities.

- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to the completion of the twelfth (12<sup>th</sup>) grade supplemented by college-level coursework and/or technical training in secretarial science and/or office administrative support and three (3) years of responsible office clerical experience.

**Licenses and Certifications:**

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

**PHYSICAL DEMANDS**

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

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.