

**City of Saratoga
Office Specialist II/III
Non Exempt**

DEFINITION

Performs a wide variety of general clerical and administrative duties in support of specific functions and programs within the department assigned.

DISTINGUISHING CHARACTERISTICS

Assigned duties to the positions in this two-tier class range from journey level to advanced/highly complex. Employees in this class work in an office environment to execute assigned duties, and to support professional and technical staff, division supervisors or managers, and department directors.

Level II – This is the journey level class within the series and has the ability to perform a full range of duties assigned, with only occasional instruction or assistance as unique situations arise. Incumbents receive general supervision.

This class is distinguished from the Office Specialist III in that the latter performs advanced journey level work requiring a high level of independence and specialized knowledge.

Level III – This class is the advanced journey level class of the Office Specialist series and is distinguished from the Office Specialist II by the responsible, varied, complex, and confidential administrative assistance. Positions in this class assume responsibility for the overall administrative functions of a division or department and report directly to a division or department head. The work often involves organizing, scheduling, coordinating, researching, compiling, exchanging, and analyzing information, and preparing correspondence. Positions in this class may exercise lead supervision and direction over intern or volunteer staff.

Positions exist in a variety of departments. Not all functions are essential in all departments depending on department needs.

ESSENTIAL DUTIES

The duties described below are intended to provide only a summary of the typical functions of the job. This is not an exhaustive or comprehensive list of all possible job responsibilities and the duties of the jobholder might differ from those outlined in the job description.

Office Specialist II Essential Functions

- Performs a wide variety of routine clerical work including filing, checking, and tracking, recording information on records, and processing information.
- Sorts and files documents and records, maintaining alphabetical index and cross-reference files.
- May act as receptionist.

- Answers the telephone and assists the general public and City staff, giving information on department and assigned program policies and procedures.
- Screens calls and visitors, and refers inquiries as appropriate.
- Schedules meetings, inspections and appointments as assigned.
- Makes referrals to services and programs available through other City departments/divisions and outside agencies.
- Receives, issues, and processes various applications, licenses, permits and other forms.
- Receives, sorts and distributes incoming and outgoing correspondence and mail.
- Maintains and updates mailing lists.
- Types or enters data, proofreads and processes a variety of documents including general correspondence, memos, and statistical charts from rough draft, audio recordings or verbal instruction using computer software applicable to assignment.
- Operates standard and specialized office equipment including computer equipment.
- Receives and responds to questions and problems related to the operation of computers, software, printers, and other office equipment.
- May develop and maintain spreadsheets, databases and other automated systems.
- Composes routine correspondence independently.
- Compiles and formats information and data from a variety of sources for special reports.
- Participates in the preparation of the department budget by assisting the director with research, data, and general information collection.
- Calculates, collects and processes fees, charges and donations.
- May issue receipts and balances related accounts.
- May receive checks by mail and processes and balances accordingly.
- May record or post information, data or figures.
- Conducts research of records, programs, processes, procedures, office equipment and supplies, office services, and resources.
- Arranges for the repair of equipment and orders office supplies and equipment.
- May scan, index and verify records for digital imaging.
- Retrieves and prepares obsolete records for destruction.
- May receive and index materials submitted for records retention.
- Maintains records, transfer logs and storage inventories of records in offsite retention.
- May assist in the support of a board or commission including posting legal notices, preparing agendas, assembling background materials, and typing minutes of meetings as assigned.
- May coordinate or participate in the preparation for meetings, presentations and events.
- May receive and process contracts and other documents.
- May scan records, such as documents, files, large plans.
- May coordinate file inventory/retention.
- May pickup and deliver all city mail (incoming and outgoing) including lifting and carrying large packages, loading mail bags and trays into carts.
- May post and maintain information on department/division intranet and/or internet website pages.
- Builds and maintains positive working relationships with co-workers, other City employees and the public using principles of good customer service.
- Performs other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES

Office Specialist II

Incumbents of the entry (II) level are expected to possess the following:

Knowledge of:

- Applicable laws, rules and regulations;
- English usage, spelling, grammar, and punctuation;
- Modern office practices and procedures;
- Computer equipment and software applications related to assignment;
- Basic mathematics;
- Research methods

Ability to:

- Perform a variety of responsible clerical duties in support of department operations including maintenance of appropriate records and preparation of general reports;
- Provide exceptional customer service to both internal and external customers;
- Sit at a desk and/or stand at a counter for long periods of time;
- Intermittently twist and reach office equipment;
- Operate a variety of office equipment such as a calculator, computer and software applicable to assignment;
- Write and use keyboard to communicate through written means;
- Learn to use a variety of software systems;
- Type at a speed necessary for successful job performance;
- Review documents related to department operations;
- Perform basic mathematical calculations;
- Verify and check files and data;
- Research and resolve discrepancies;
- Track projects;
- May lift or carry light to moderately heavy items;
- Run errands;
- Work independently with limited supervision and effectively in a team environment;
- Use initiative and sound independent judgment within established guidelines;
- Prioritize work and coordinate several work activities;
- Learn organization, procedures and operations of the city as necessary to assume assigned responsibilities;
- Understand, interpret, apply and explain department policies, procedures and rules;
- Learn services and resources available to the public;
- Explain, observe, identify and problem solve office operations and procedures for the public and with staff;
- Communicate clearly and concisely, both orally and in writing;
- Establish and maintain effective working relationships with those contacted in the course of work;
- Work with various cultural and ethnic groups in a tactful and effective manner.

Office Specialist III Essential Functions

- Performs a variety of complex, specialized and responsible clerical duties in support of functions or programs within a department.
- Assumes overall clerical responsibility for an assigned program area that involves maintaining appropriate records, preparing necessary reports, and serving as an overall information source for the program as assigned.
- May act as a receptionist.
- Provides office management support to department involving the performance of a broad range of administrative tasks including ensuring that work is handled on a priority basis and completed in a timely manner.
- May provide lead support and direction to interns and/or volunteers.
- Responds to complaints and requests for information on regulations, procedures and policies relating to responsibilities assigned.
- Makes referrals to services and programs available through other City departments/divisions and outside agencies.
- Types or enters data, proofreads and processes a variety of documents including general correspondence, memos, and statistical charts from rough draft, audio recordings or verbal instruction using computer software applicable to assignment.
- Operates standard and specialized office equipment including computer equipment in order to perform full range of job duties.
- Receives and responds to questions and problems related to the operation of computers, software, printers, and other office equipment.
- Composes routine correspondence independently.
- Maintains confidentiality when handling sensitive information.
- Maintains and utilizes department database information as needed.
- Compiles and formats information and data from a variety of sources for statistical and financial reports.
- Maintains financial, statistical and/or operational reports and records as applicable.
- Calculates, collects and processes fees, and charges.
- Participates in the preparation of the department budget by assisting the director with research, data, and general information collection.
- Reviews reports, identifies and researches anomalies, corrects errors and/or brings anomalies to the attention of appropriate staff.
- Performs general clerical duties including filing, checking, tracking and recording information which may include records, and processing department payroll, budget information, purchasing or training information.
- May assist in the support of a board or commission including posting legal notices, preparing agendas, assembling background materials, and typing minutes of meetings as assigned.
- May coordinate or participate in preparation for meetings, presentations and events.
- May post and maintain information on department/division intranet and/or internet website pages.
- Builds and maintains positive working relationships with co-workers, other City employees and the public using principles of good customer service.
- Answers the telephone and assist the general public, giving information on department and assigned program policies and procedures.

- Screens calls and visitors, and refers inquiries as appropriate.
- May use a radio to dispatch staff to service locations (not all departments).
- Travels to various department locations to provide support and set up as needed for functions.
- Other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES

Office Specialist III

Knowledge of:

- Applicable laws, rules and regulations;
- English usage, spelling, grammar, and punctuation;
- Modern office practices and procedures;
- Computer equipment and software applications related to assignment;
- Basic mathematics;
- Research methods.

Ability to:

- Perform a variety of complex, specialized and responsible clerical duties in support of specific functions or programs within a department;
- Plan and assign work and train interns and/or volunteers;
- Provide an exceptional level of customer service to both internal and external customers;
- On a continuous basis, sit at a desk and/or stand at a counter for long periods of time;
- Intermittently twist and reach office equipment;
- Operate a variety of office equipment such as a calculator, computer and software applicable to assignment;
- Write and use keyboard to communicate through written means;
- Learn to use a variety of software systems;
- Type at a speed necessary for successful job performance;
- Review documents related to department operations;
- Compile and maintain complex and extensive records and files;
- Develop and maintain spreadsheets, databases and other automated systems;
- Perform mathematical computations;
- Research and resolve discrepancies;
- Track projects;
- May lift or carry light to moderately heavy items;
- Run errands;
- Work independently with limited supervision and effectively in a team environment;
- Use initiative and sound judgment;
- Prioritize work and coordinate several work activities;
- Understand the organization, procedures and operations of the city as necessary to assume assigned responsibilities;
- Understand, interpret and apply a body of technical information beyond normal department policies and procedures;
- Understand, interpret, apply and explain department policies, procedures and rules;
- Learn services and resources available to the public;

- Explain, observe, identify and problem solve office operations and procedures for the public and with staff;
- Communicate clearly and concisely, both orally and in writing;
- Establish and maintain effective working relationships with those contacted in the course of work;
- Work with various cultural and ethnic groups in a tactful and effective manner.

EDUCATION, TRAINING AND EXPERIENCE

Any combination of education and/or experience that has provided the knowledge and skills necessary to satisfactory job performance would be qualifying.

Office Specialist II: A typical way to obtain the required knowledge and skills would be: Completion of the twelfth grade and two years of general clerical experience.

Office Specialist III: A typical way to obtain the required knowledge and skills would be: completion of the twelfth grade or equivalent and three years of clerical experience at the journey level (Office Specialist II equivalent).

Licenses/Certificates/Special Requirements

Possession of, or ability to obtain by time of appointment, a valid California driver's license may be required.

WORK ENVIRONMENT AND PHYSICAL DEMANDS

The work environment and physical demands described here are representative of those required by an employee to perform to the essential functions of this job with or without reasonable accommodations.

- Sufficient clarity of speech and hearing or other communication capabilities, with or without reasonable accommodation, to enable the employee to communicate effectively;
- Sufficient vision or other powers of observation, with or without reasonable accommodation, to enable the employee to review a wide variety of materials in electronic or hard copy form;
- Sufficient manual dexterity, with or without reasonable accommodation, to enable the employee to operate a personal computer, telephone, and other related equipment;
- Sufficient personal mobility and physical reflexes, with or without reasonable accommodation, to enable the employee to safely lift, move, or maneuver whatever may be necessary to successfully perform the duties of their position;
- Sufficient personal mobility and physical reflexes, with or without reasonable accommodation, to enable the employee to efficiently function in a general office environment; and
- Sufficient personal mobility and physical reflexes, with or without reasonable accommodation, to enable the employee to efficiently function in a general office environment.

Environmental Requirements: Under California law (California Government Code Section 3100-3109), all City of Saratoga employees are designated as Disaster Service Workers,

(DSW). In the event of a catastrophic event, City of Saratoga employees may be expected to fulfill emergency action assignments. As DSW's, employees may be assigned to assist in any disaster service activity that promotes the protection of public health and safety and preservation of lives and property.