



Staff Report

July 31, 2018

TO: Honorable Mayor and Members of the Town Council
FROM: Sean Rabé, Town Manager
DATE: July 31, 2018
RE: Title Change and Administrative Clerk's Job Description

Recommendation

Approve the title change from Office Technician to Administrative Clerk and the job description.

Issue Statement and Discussion

When the Town incorporated and in the several years after, a series of job descriptions were approved for the various employee positions. In the ensuing years, there have been a few positions approved but most of them have not been reviewed and updated to meet added duties and today's standards. In a process that will move forward over the next few months, it is the intention that all of the job descriptions will be reviewed and updated and brought forward for approval.

The "Office Technician" position does not encompass the variety of duties that the front office person has been performing. The existing Office Technician description has been reviewed along with descriptions from other jurisdictions and the new title of "Administrative Clerk" and job description defines what the front office position has been doing and is more consistent with today's practices and standards.

CEQA Requirements

There are no CEQA implications associated with the recommended action.

Financial and/or Policy Implications

None with the recommended action.

Attachments

- A. Administrative Clerk's Job Description

TOWN OF LOOMIS

FLSA: Non-Exempt

ADMINISTRATIVE CLERK**DESCRIPTION:**

Performs a wide variety of administrative office support and clerical duties and activities of a general nature in support of various assigned departments; receives and directs telephone calls and visitors; provides information and assistance at the counter, staff and general public; receives, routes, and distributes incoming and outgoing mail; performs a variety of records management duties; and performs word processing duties. Receives general supervision from the Administrative Service Officer/Deputy Town Clerk.

DISTINGUISHING CHARACTERISTICS

The Administrative Clerk provides and performs a wide variety of clerical and office support for all departments. Assigned work requires the use of judgment in selecting appropriate procedures, conducting transactions with customers and the public, and solving routine and non-routine problems based on knowledge gained through experience. Receive instruction and assistance as needed as new or unusual situations arise, and becomes fully aware of the operating procedures and policies of the office. Work is normally reviewed only on completion and for overall results.

This position is highly visible to the public at the front counter where visitors will be received, greeted, welcomed, directed and announced in a professional manner.

ESSENTIAL DUTIES:

1. Answering, screening and forwarding incoming phone calls.
2. Assist the general public, Town staff, and outside groups and agencies by providing information related to specific departments and projects; receive calls; respond to complaints and requests for information relating to assigned responsibilities; refer callers to appropriate Town staff for further assistance as needed.
3. Type, word process, format, edit, revise, proofread, and process a variety of documents and forms, including general correspondence, notices, reports, applications, permits, memos, agreements, charts and other documents from rough draft or verbal instructions; compose routine correspondence; copy, disseminate, and post documents and information as appropriate.
4. Provide information and forms to the public; collect and process appropriate permits and applications; apply applicable policies and procedures in determining completeness of applications, permits, licenses, forms, records, and reports.
5. Operate a variety of office equipment including a computer, copier, fax machine, adding machine; utilize various computer applications and software packages.

6. Compile, prepare, and enter data into a computer from various sources including accounting, statistical, and related documents; create and maintain computer based tracking information and reports including assigned databases, records, and lists; input corrections and updates; verify data for accuracy and completeness; assist in the compilation of reports.
7. Maintain accurate and up-to-date office files and records for assigned areas; prepare and monitor various logs, accounts, and files for current and accurate information including manual and computer logs of documents processed, calls and complaints received, applications for permits and licenses, and other requests; organize and maintain filing systems; collect information and prepare regular and periodic statistical reports.
8. Monitor inventories of supplies and materials; prepare purchase requisitions and request for payment; and order new supplies as needed.
9. Perform a variety of routine clerical accounting duties and responsibilities involved in financial record keeping and reporting for assigned areas; maintain a variety of routine accounting records, logs, and files.
10. Maintain calendar of activities, meetings, and various events for assigned staff; coordinate activities and meetings with other Town departments, the public, and outside agencies; coordinate and arrange special events as assigned.
11. Process mail including receiving, sorting, date-stamping, logging, and distributing incoming and outgoing correspondence and packages.
12. Sort, assign codes, cross-reference, research, duplicate, and file a wide variety of Town records, documents, and other materials for area of assignment; create new files; create and maintain chronological files; maintain up-to-date file listings, indexes, and cross-references; retrieve, duplicate, distribute, and track with users copies of records as requested.
13. Assist in the enrollment of participants in an assigned program.
14. Process bills for fees; record payments; send delinquent notices when necessary; and process invoices for payment.
15. Process permits and licenses; collect and process fees and charges.
16. Schedule inspections and appointments as assigned.
17. Serves as recording clerk for staff and committee meeting when necessary.
18. Perform related duties as required.

MINIMUM REQUIREMENTS:

Education/Training: Equivalent to completion of the twelfth grade.

Experience: Two years of responsible clerical experience.

Knowledge of:

- English usage, spelling, grammar, and punctuation.
- Office procedures, methods, and equipment including computers.
- Basic computer applications such as word processing, spreadsheets, and databases.
- Records management principles and procedures including record keeping and filing principles and practices.
- Methods and techniques of proper phone etiquette.
- Mathematical principles.
- Basic principles of business letter writing and report preparation.

Ability to:

- Perform a variety of clerical and office support duties of a general nature for an assigned office.
- Learn the organization, operation, and services of the Town and of outside agencies as necessary to assume assigned responsibilities.
- Learn to correctly interpret and apply general administrative and departmental policies and procedures.
- Learn to apply applicable federal, state, and local laws, and codes, and regulations.
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
- Learn and effectively utilize various software applications.
- Learn and apply new information and skills.
- Type or enter data at a speed necessary for successful job performance.
- Establish and maintain a variety of files and records.
- Prepare routine correspondence and memoranda.
- Accurately count, record, and balance assigned transactions.
- Perform routine mathematical calculations.
- Respond tactfully, clearly, concisely, and appropriately to inquiries from other Town staff, the general public, and outside agencies.
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
- Plan and organize work to meet changing priorities and deadlines.
- Understand and carry out oral and written directions.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Physical Demands and Work Environment:

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

- **Environment:** Work is performed primarily in a standard office environment with extensive public contact and frequent interruptions.
- **Physical:** Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; to travel to other locations using various modes of private and commercial transportation; and to verbally communicate to exchange information.
- **Vision:** See in the normal visual range with or without correction. Specific vision abilities required by this job include close vision and the ability to adjust focus.
- **Hearing:** Hear in the normal audio range with or without correction.

ACKNOWLEDGMENT

I acknowledge that I have read the job description and requirements for the Administrative Clerk position and I certify that I can perform these functions.

Applicant Signature

Date

Witness