

**San Benito County Water District**

<b>Classification Unit:</b>	<b>Field and Office</b>
<b>Salary Range:</b>	<b>I-26, II-34, III-44</b>
<b>Last Revision:</b>	<b>September 2007</b>

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**OFFICE SPECIALIST I/II/III**

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in this class. Specifications are not intended to reflect all duties performed within the job.*

**DEFINITION**

Performs a variety of clerical duties in support of an assigned District function; to receive and respond to inside and outside calls and answer questions in a timely and efficient manner; to perform a variety of records maintenance, storage and retrieval functions; and to perform a variety of administrative support tasks, to and including research through the internet, relative to assigned area of responsibility.

**DISTINGUISHING CHARACTERISTICS**

**OFFICE SPECIALIST I:**

This is an entry level class in the Office Specialist series. This class is distinguished from the Office Specialist II by the performance of the more routine tasks and duties assigned to positions within the series while learning to perform the full range of duties as assigned. Since this class is typically used as a training class, employees may have only limited or no directly related work experience.

**OFFICE SPECIALIST II:**

This is a journey level within the Office Specialist series. Employees within this class are distinguished from the Office Specialist I by the performance of the full range of duties as assigned including maintaining filing systems and preparing correspondence. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Further, this class is used throughout the District and may provide the opportunity to gain experience in specialized area.

**OFFICE SPECIALIST III:**

This is an advanced journey level class in the Office Specialist series. Employees at this level are distinguished from other classes within the series by the level of responsibility assumed and the complexity of duties assigned. Employees perform the most difficult and responsible types of duties assigned to classes within this series including providing significant secretarial and administrative support to an assigned

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Supervisor. Positions at this level may provide lead supervision and training over lower level support staff. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility.

### **SUPERVISION RECEIVED AND EXERCISED**

#### **OFFICE SPECIALIST I:**

Exercises no supervision.

#### **OFFICE SPECIALIST II:**

May exercise technical and functional supervision over lower level staff including Office Specialist I.

#### **OFFICE SPECIALIST III:**

Exercises technical and functional supervision over lower level staff including Office Specialist I and Office Specialist II.

### **ESSENTIAL FUNCTION STATEMENTS**

Essential responsibilities and duties may include, but are not limited to, the following:

#### **OFFICE SPECIALIST I and II:**

- ❖ Perform a variety of clerical support duties in support of an assigned District function.
- ❖ Receive, greet and screen telephone calls, visitors and customers; take messages or direct visitors to appropriate staff; respond to or resolve customer complaints as necessary.
- ❖ Research and assemble information from a variety of sources for the completion of forms or the preparation of reports.
- ❖ Type various correspondence, forms and specialized documents from drafts, notes, dictated tapes or brief instructions.
- ❖ Proofread and check typed and other materials for accuracy, completeness, proper format, punctuation, grammar, spelling and compliance with District guidelines.
- ❖ Perform data entry functions; ensure proper documentation, coding and input of information; print data, make necessary copies, attach materials and distribute as appropriate.
- ❖ Store, maintain and retrieve a wide variety of active and inactive District records, information and files; purge and destroy manual and automated files and records according to retention schedules; track monitor inactive files and records.

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- ❖ Prepare files for storage; receive and prepare storage boxes; prepare necessary forms to transfer and track boxes in storage; type levels, cards, jackets and other materials for records identification.
- ❖ Analyze, code, index and file incoming and outgoing documents, maps, plans, photographs, drawings and other technical materials according to established criteria.
- ❖ Operate a variety of office equipment including a typewriter, copier, facsimile machine, adding machine, computer, video display terminal, printer and related word processing equipment.
- ❖ Receives, screen, sort and deliver District mail and e-mail including packages, supplies and other materials, prepare and meter outgoing mail and special packages.
- ❖ Collect cash and issue receipts; balance cash received.
- ❖ Perform related duties and responsibilities as required.

### OFFICE SPECIALIST III:

*In addition to the essential responsibilities and duties for Office Specialist I and II:*

- ❖ Assume responsibility for assigned administrative functions to ensure the smooth operations of the District.
- ❖ Respond to questions, inquires or complaints from the public or outside agencies regarding various District operations including customer accounts and District construction projects.
- ❖ Provide assistance in the development, administration and implementation of the District's budget.
- ❖ Type various correspondence, form and specialized documents from drafts, notes, dictated tapes or brief instructions.
- ❖ Word process draft and final copies of correspondence, charts, contracts, reports, forms, memoranda, minutes, tables, manuals, graphics and other printed materials utilizing various word processing techniques.
- ❖ Oversee the storage, maintenance and retrieval of a wide variety of active and inactive District records, information and files; create and maintain the classification and indexing system for active and inactive records; ensure records are destroyed according to established retention schedules.
- ❖ Train assigned employees in their areas of work including office administrative support techniques, mail sorting and distributing and word processing methods and procedures.

### Typical Physical Activities

#### OFFICE SPECIALIST I, II and III:

- ❖ Communicates orally with District management, co-workers and the public in a face-to-face, one-on-one and group settings.
- ❖ Regularly uses a telephone for communications.
- ❖ Sits for extended time periods.
- ❖ Hearing and Vision within normal ranges.

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### **EMPLOYMENT STANDARDS**

#### **OFFICE SPECIALIST I:**

##### **Knowledge of:**

- ❖ Basic office procedures and methods
- ❖ Basic principles and techniques of filing and record keeping
- ❖ Basic principles and procedures of record keeping, maintenance, retention and retrieval
- ❖ English usage, spelling, grammar and punctuation
- ❖ Basic mathematical principles

##### **Ability to:**

- ❖ Perform a variety of general clerical work
- ❖ Learn to independently prepare correspondence
- ❖ Learn methods and techniques of receiving, sorting and distributing mail
- ❖ Store, maintain and retrieve a wide variety of active and inactive District records, information and files
- ❖ Ensure adherence to established records retention guidelines
- ❖ Deal tactfully with the public in potentially hostile situations in a customer service environment
- ❖ Read, interpret and apply rules, policies and procedures
- ❖ Operate standard office equipment
- ❖ Understand and follow oral and written instructions
- ❖ Communicate clearly and concisely, both orally and in writing
- ❖ Establish and maintain effective working relationships with those contacted in the course of work
- ❖ Learn quickly the policies and procedures related to the work
- ❖ Use initiative and sound independent judgment within established guidelines
- ❖ Organize work, set priorities, meet critical deadlines and follow-up assignments with minimum of direction

##### **Desirable Experience and Education**

Any combination of education and experience that has led to the acquisition of the knowledge, skills and the abilities as indicated below. Typical ways of acquiring the knowledge, skills and abilities are:

##### **Experience:**

One (1) year of experience in general office or record keeping work.

##### **Education:**

Completion of the twelfth grade or equivalent.

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### OFFICE SPECIALIST II:

*In addition to the qualifications for Office Specialist I:*

#### **Knowledge of:**

- ❖ Modern office procedures, methods and equipment including computers
- ❖ Principles and procedures of record keeping
- ❖ Principles and procedures of document filing, maintenance, retention and retrieval
- ❖ Methods and techniques of receiving, sorting and distributing mail

#### **Ability to:**

- ❖ Maintain accurate detailed records
- ❖ Prepare clear, concise and accurate periodic and special reports
- ❖ Independently prepare correspondence including transcription of recorded material
- ❖ Research and interpret technical documents including blueprints and parcel map books and complex water customer records
- ❖ Respond to requests and inquires from the general public

#### **Desirable Experience and Education**

Any combination of education and experience that has led to the acquisition of the knowledge, skills and the abilities as indicated below. Typical ways of acquiring the knowledge, skills and abilities are:

#### **Experience:**

Two (2) years of experience in responsible general office or record keeping work, equivalent to Office Specialist I.

#### **Training:**

High School education supplemented by specialized office skills course.

### OFFICE SPECIALIST III:

*In addition to the qualifications for Office Specialist I and II:*

#### **Knowledge of:**

- ❖ Principles of business letter writing and basic report preparation
- ❖ Operations, policies and procedures of the office to which assigned
- ❖ Pertinent Federal, State and local laws, codes and regulations
- ❖ Advanced principles and procedures of record keeping, maintenance, retention and retrieval

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### **Ability to:**

- ❖ Independently perform the most difficult clerical and administrative support functions
- ❖ Independently prepare correspondence

### **Experience and Training Guidelines:**

*Any combination of education and experience that has led to the acquisition of the knowledge, skills and the abilities as indicated below. Typical ways of acquiring the knowledge, skills and abilities are:*

### **Experience**

Four (4) years of increasingly responsible clerical, secretarial or administrative support equivalent to Office Specialist II.

### **Training**

High School education supplemented by specialized office or administrative support training.

## **WORKING CONDITIONS**

### **Environmental Conditions**

Office environment; exposure to computer screens

### **Physical Conditions**

Essential functions may require maintaining physical condition necessary for moderate or light lifting, walking, standing, or sitting for prolonged periods of time; extensive use of computer keyboard, visual acuity for reading documents, correspondence and computer screens, operating office equipment.

## **SPECIAL REQUIREMENTS**

These requirements are applicable to all positions within this series:

- ❖ Possession of a valid California Driver's License, Class C, as issued by the State of California Department of Motor Vehicles; and a driving record acceptable to the District's auto insurance provider.
- ❖ Obtain and maintain defensive drivers training certification (training provided by the District)
- ❖ Obtain and maintain CPR and First Aid training certification (training provided by the District)