

	<b>CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL</b>
	<b>POLICY 10.2</b>
	<b>PLANNING &amp; BUILDING DEPARTMENT</b>
	<b>Adoption Date:</b> <i>See notes following each position</i>
<b>Revised Date:</b> <i>See notes following each position</i>	
<b>Authority:</b> City Manager (granted via City Council Resolution No. 2019-04)	

**10.2.1 ADMINISTRATIVE CLERK**

**CLASSIFICATION:** Regular full-time position.

**DEPARTMENT:** Planning/Building

**POSITION SUMMARY**

The Administrative Clerk is responsible, under supervision, for document scanning, preparation and distribution of committee agenda packets, taking minutes at committee meetings, uploading documents to the City website and keeping the website calendar up-to-date. Performs a wide variety of complex office support and secretarial duties for the City Clerk, Planners, and Building Official.

**GENERAL DESCRIPTION**

The Administrative Clerk reports to the City Clerk. Supervision of other employees is not a duty of this class.

**DUTIES AND RESPONSIBILITIES**

- Scans a wide variety of documents.
- Uploads documents to the City website; responsible for maintenance of website activities calendar.
- Fills in for Department Secretaries during breaks, vacations, and other occasions when they are away from the front desk for extended periods. In this capacity, screens telephone callers and office visitors, providing them with desired information or referring them to appropriate staff.
- Performs general word processing and produces form letters, notices, agendas, etc.; filing; copying; setting up meetings, etc.
- Composes memos and letters from brief, verbal instructions.
- Compiles mailing lists from electronic sources, edits them, and produces mass mailings.
- Prepares, copies and distributes agenda packets for committees. Take and transcribes minutes at committee meetings.
- Assists with the yearly business license billing.
- Performs large copying jobs and binding jobs.
- Opens and screens mail.
- Performs related duties and responsibilities as required.

## **KNOWLEDGE AND ABILITIES**

### **Knowledge of:**

- Personal computer systems, Windows Professional 7, Adobe Acrobat, and the world wide web.
- Modern office methods, practices and equipment.
- Basic mathematics.
- Correct English usage, spelling, grammar and punctuation.

### **Ability to:**

- Type at a minimum rate of 50 words per minute from clear, legible copy.
- Produce a wide variety of documents using MS Word, Excel, and Office Outlook 2007 or higher.
- Understand and carry out complex, multi-step procedures from verbal and/or written instructions.
- Operate a multi-line phone system.
- Monitor deadlines and legal requirements for compliance with laws and regulations.
- Perform consistently with accuracy and great attention to detail.
- Take responsibility and exercise good judgment in recognizing scope of authority.
- Maintain effective working relationships with fellow employees.
- Present a clean, neat and professional appearance.
- Exercise good judgment, courtesy, and tact with the public and visitors.

### **Physical ability to:**

- Maintain concentration to keep track of and complete multiple tasks in an environment that is often noisy and distracting.
- Sit and work at a computer keyboard with a mouse for an average of 5-6 hours per day.
- Stand, walk, reach, twist, turn, kneel, bend squat, and stoop in performance of daily activities.
- Grasp, perform repetitive hand movements, and fine coordination in writing receipts and using a computer keyboard.
- Near vision in reading mail, completed forms, and using a computer.
- Hear for communicating on the phone and in person.
- Speak clearly for the purpose of giving concise, accurate and complete information.
- Lift, drag, and push files, binders, plans or other materials weighing up to 25 pounds.

## **MINIMUM QUALIFICATIONS**

Any combination of experience and education that would likely provide the required knowledge and abilities to perform the essential duties and responsibilities is qualifying, such as:

- Graduation from high school or equivalent supplemented by college or business school training in records management, secretarial science, office management, or office technology.
- One year experience using MS Office Suite 2007 or higher in an office setting.

*(Added 09/09/2013; amended 6/9/2014)*

### **10.2.2 ASSISTANT PLANNER**

**CLASSIFICATION:** Confidential, hourly, part-time position (30-35 hours per week)

**DEPARTMENT:** Planning/Building

#### **POSITION SUMMARY**

Under the general supervision of the City Planner, performs professional planning work including review of current planning projects and undertaking assignments in the areas of public information, neighborhood preservation, research and analysis, written and oral presentations, and policy development.

#### **DUTIES AND RESPONSIBILITIES**

- Receives planning application materials.
- Compares development parameters to code requirements.
- Prepares reports.
- Conducts research and prepares recommendations on planning issues and ordinances.
- Provides information on planning and zoning issues to applicants, the general public and other departments.
- Assists with research.
- Performs other duties, as required.
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#### **KNOWLEDGE AND ABILITIES**

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

- Fundamental planning principles.
- Role and function of general plan and zoning ordinances.
- California planning, subdivision and environmental law and their relationship to day-to-day activities of a planning department.
- Scope and function of a planning department and its relationship to other City departments.
- Research methods.
- Report preparation.
- Review of architectural or building plans, particularly related to residences, is desirable.

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

- Write accurate and concise technical reports and memoranda.
- Explain planning and zoning requirements clearly to the public, applicants and other departments.
- Research, analyze and summarize planning issues.
- Work effectively with City departments, project applicants and the general public.
- Operate a personal computer using Windows environment software, including Microsoft Word and Excel.

##### **Physical ability to:**

- Sit and stand for prolonged periods and to work at a computer keyboard with a mouse for an average of 4 hours per day.
- Write, reach, twist, turn, and stoop in performance of daily office activities.
- Use near and far vision in reading, reviewing plans, using the computer monitor, and

- looking at property.
- Use hearing and speaking in communicating with individuals and groups and working on the phone.
  - Lift, drag, and push files, paper, plans, and documents weighing up to 20 pounds.
  - Visit properties and make site reviews in all weather conditions including wet, hot, and cold.
  - Work irregular or extended hours to attend various committee meetings.
  - Work with constant interruptions, and at times, with clients who may be upset when discussing and enforcing City codes.

### **MINIMUM QUALIFICATIONS**

Any combination of experience and education that would likely provide the required knowledge and abilities to perform the essential duties and responsibilities is qualifying.

*(Added 2008; updated 12/2010; rev. 11/14/2011)*

### **10.2.3     ASSOCIATE PLANNER AND PLANNER**

**CLASSIFICATION:** Confidential, hourly, part-time position (28-35 hours per week)

**DEPARTMENT:** Planning/Building

#### **POSITION SUMMARY**

Under the general supervision of the City Planner, the Associate Planner/Planner performs a variety of general planning duties including project management, research, data collection, field inspections, plan review, responding to inquiries at the public counter, preparation of correspondence, filing documents, and preparation of staff reports.

#### **GENERAL DESCRIPTION**

The Planning Department is staffed by a full-time City Planner, one Department Secretary who divides scheduled time between Planning and general reception duties, a part-time Assistant Planner, and a part-time Associate Planner / Planner. The City of Belvedere is 99.9% residential and completely built out. Depending on the size and type of project, Design Review, Subdivision and Zoning approvals are handled at either the administrative level or by the seven-member Planning Commission which holds hearings on a monthly basis.

This is the journey-level class in the professional City Planning series. Positions in this class are flexibly staffed and are normally filled by advancement from the entry class, or when filled from the outside, require prior planning work experience. Work in this class is distinguished from that of the Assistant Planner by the greater complexity of the assignments received, by increasing responsibility for project outcomes, and by the greater independence with which the incumbent is expected to operate.

#### **DUTIES AND RESPONSIBILITIES**

- Responds to public inquiries and requests for service, answers questions regarding the zoning and design codes.
- Performs plan checks for zoning, subdivision and design compliance.
- Reviews designated permit applications and assesses fees.
- Prepares staff reports and exhibits for the City Council and Planning Commission meetings, such as project analysis, maps, plot plans, renderings, charts and graphs.
- Receives and evaluates site plan and Design Review permits and related applications.
- Determines compliance with Zoning, Subdivision and Design Review Ordinance regulations and prepares administrative level Design Review approvals or denials.
- Evaluates discretionary project approvals for compliance with California Environmental Quality Act (CEQA).
- Addresses and resolves unauthorized construction or other improvements completed without benefit of Zoning or Design Review approvals. Pursues Nuisance Abatement for unauthorized work or other noncompliance if necessary.
- Assists planning personnel with current and advance planning projects and activities, including research, compilation of information, inspections and preparation of special reports.
- Conducts final inspections for planning projects to determine on-site if the project is compliant with the approved plan set.

- Updates and maintains zoning information, record files, and other planning documents.
- Receives project applications, prepares project files, prepares closeout of project files.
- Participates in staff meetings and in-service training as required.
- Adheres to City and departmental policies and procedures.
- Prepares and distributes Initial Environmental Study and subsequent determinations. Files Notices of Intent, Notices of Determination and other CEQA forms.
- Contributes to advance planning projects and activities, including research, compilation of information, inspections and preparation of special reports, such as updates to the General Plan and Municipal Code.
- Drafts, evaluates and presents Planning policies and amendments to the Municipal Code.
- Assumes some of the City Planner's responsibilities when necessary such as coordination and staffing of Planning Commission meetings and functional supervision of Planning Department Secretary and Assistant Planner.
- Responds to public inquiries and requests for service, answers questions regarding the Zoning and Design Review Ordinance regulations.
- Regularly attends Planning Commission meetings.
- Liaison to standing City Committees, ad-hoc committees, and community organizations.
- Performs related duties and responsibilities as required.

## **KNOWLEDGE AND ABILITIES**

### **Knowledge of:**

- Planning and zoning methods, practices and techniques.
- Planning and zoning maps and records.
- Record-keeping.
- Applicable laws, codes, regulations, policies, and procedures.
- Modern office methods, procedures and equipment.
- Various computer programs and applications.
- Correct English usage, spelling, grammar and punctuation.

### **Ability to:**

- Communicate clearly and concisely both orally and in writing.
- Follow applicable oral and written instructions.
- Comprehend and carry out policies, procedures and regulations.
- Use analytical skills in reviewing plans and supporting documentation to determine the level of risk exposure to the City, or other consequences to the community, presented by a proposed building project.
- Maintain effective working relationships with fellow employees and the public and work within a team-based system.
- Exercise good judgment, courtesy, and tact with the public and staff.
- Exercise initiative make sound decisions in accordance with established regulations, and work independently, without immediate supervision.
- Present a clean, neat and professional appearance.
- Evaluate land use information in the field; utilize quality customer service skills and techniques.

### **Physical ability to:**

- Sit and stand for prolonged periods and work at a computer keyboard with a mouse for an average of 6 hours per day.

- Write, reach, twist, turn, and stoop in performance of daily office activities.
- Use near and far vision in reading, reviewing plans, using the computer monitor, and looking at property.
- Use hearing and speaking in communicating with individuals and groups and working on the phone.
- Lift, drag, and push files, paper, plans, and documents weighing up to 20 pounds.
- Visit properties and make site reviews in all weather conditions as necessary, including wet, hot, and cold.
- Work with constant interruptions, and at times, with clients who may be upset when discussing and enforcing City codes.

### **MINIMUM QUALIFICATIONS**

Any combination of experience and education that would likely provide the required knowledge and abilities to perform the essential duties and responsibilities is qualifying, such as:

- Graduation from an accredited college or university with a degree in Planning, Architecture, Landscape Architecture, or closely-related field.
- Three years of relevant work experience in planning, architecture, or a related field. Additional work experience may be substituted for the required education on a year-for-year basis.
- Valid California Class C driver's license and satisfactory driving record.
- Satisfactory background check.

*(Added 2008; updated 12/2010; rev. 11/14/2011; updated 6/9/2014)*

#### **10.2.4     BUILDING INSPECTOR I/II**

**CLASSIFICATION:** Regular, full-time position.

**DEPARTMENT:** Planning/Building

#### **POSITION SUMMARY**

Inspects all aspects of construction, predominantly of residential dwellings, for compliance with model codes and approved plans; conducts life/safety inspections; assists with code compliance; answers model code questions from the public.

#### **GENERAL DESCRIPTION**

The City of Belvedere is a small, affluent community with approximately 1000 living units and virtually no commercial area. The Department consists of one building official/code enforcement officer, one building inspector, and a department secretary. The Belvedere Building Department issues approximately 250 construction permits a year and conducts 2000 inspections.

This position reports to the Building Official/Code Enforcement Officer and performs under his/her direct supervision. Supervision of other employees is not a duty of this classification. The Building Inspector is not assigned personal clerical support and generates his/her own paperwork.

#### **DUTIES AND RESPONSIBILITIES**

- Performs field inspections of residential and commercial construction and verifies conformance to applicable state and local codes as well as approved plans.
- Issues corrections notices and delivers stop work orders when necessary.
- Provides state and local code information to the public.
- Investigates citizen complaints, including assisting with code enforcement.
- Maintains records and prepares written reports and correspondence when necessary.
- Performs related duties and responsibilities as required.

#### **KNOWLEDGE AND ABILITIES**

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

- General knowledge of Federal, State, County and City codes relating to building construction.
- Types of building materials and variations in their quality.
- Modern construction methods.
- Principals and techniques of building inspection.

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

- Read, understand and interpret construction drawings.
- Calculate square footage from building plans and perform other similar basic mathematical calculations relating to the interpretation of construction plans, specifications and other documents.
- Understand and explain provisions of applicable Federal, State, County and City construction related codes and regulations.
- Express professional opinions, based on knowledge and experience.



- Communicate effectively orally and in writing.
- Use a computer, including word processing and email.
- Use analytical and research skills so as to independently pursue solutions to complex code or construction related questions.
- Excellent customer service skills.
- Interacts effectively when confronting potentially volatile situations.
- Maintain a cooperative working relationship with property owners, contractors, design professionals, employees and the public.

**Physical ability to:**

- Climb into attics and onto scaffolding, stoop kneel and walk on uneven surfaces and crawl under buildings and into close spaces.
- Sit, stand, and walk on level, rough and slippery surfaces.
- Reach, twist, turn, kneel, bend, stoop, squat, and crawl during performance of job duties.
- Grasp and make repetitive hand movements in the performance of job duties. Use fine coordination when measuring designated areas for proper conformance.
- Use ladders to climb to unusual heights, requiring dexterity. Walks on roofs, scaffolding, ceiling and floor joists, requiring excellent balance.
- Crawl under houses and into enclosed spaces.
- Near and far vision to compare onsite construction conformance with the approved plans.
- Lift, push or move barriers weighing greater than 25 pounds when doing field inspections.
- Works in all weather conditions including wet, hot and cold.
- Move in close proximity to unguarded electrical power, noise and vibration producing tools/equipment as well as close proximity to moving vehicles and heavy equipment which may subject the employee to falling mechanical, electrical, traffic and other hazards.

**MINIMUM QUALIFICATIONS**

Any combination of experience and education that would likely provide the required knowledge and abilities to perform the essential duties and responsibilities is qualifying, such as:

- High school diploma or equivalent.
- Two years of relevant experience.
- ICBO certification as a building inspector or combination inspector.
- Valid California Class C driver's license and satisfactory driving record.

*(Added 2008)*

## **10.2.5 BUILDING OFFICIAL/CODE ENFORCEMENT OFFICER**

**CLASSIFICATION:** Position operates as either a confidential, exempt (salaried), full-time position or two separate contract consultants.

**DEPARTMENT:** Planning/Building.

### **POSITION SUMMARY**

This senior management position reports directly to the City Manager and serves as the Building Official and Code Enforcement Officer for the City. This position participates in the operations of all departments, but is directly responsible for the day-to-day operation of the Building Department. The Building Department has an annual budget of approximately \$531,000. The department issues 250 construction permits a year, conducts 2110 inspections, and handles as many as 100 enforcement requests. The position is responsible for directing the daily activities of, and evaluating one building inspector and one department secretary. The position is not assigned personal clerical support and generates his/her own paperwork.

### **DUTIES AND RESPONSIBILITIES**

- Processes permit applications, reviews plans, and approves permits.
- Administers Construction Time Limit Ordinance and re-evaluates permit fees.
- Performs enforcement of construction Codes and a variety of City ordinances and responds to citizen complaints.
- Performs plan checks.
- Administers floodplain ordinance.
- Performs field inspections when necessary.
- Works on a daily basis with the city manager, planning staff, city engineer, police staff and clerical staff to implement various City and departmental goals.
- Communicates daily with permit applicants, their representatives, contractors and the public both orally and in writing.
- Performs related duties and responsibilities as required.
- Assigns situs addresses, including those for newly-created second units.
- Ex-officio member of Planning Commission (Muni Code 2.28.020), attends Planning Commission meetings, provides technical staff support to the Commission.
- Drafts revisions to existing City ordinances, develops new ordinances (when applicable), prepares and presents staff reports to the City Council.
- Determines necessity for emergency tree removal in cooperation with the Planning staff (Muni Code 20.04.020C0).
- Conducts pre-construction meetings with permit applicants.
- Participating member of the Traffic Safety Committee and Personnel Safety Committee.
- Participates in meetings of the Construction Time Limit Extension Committee and Construction Time Limit Appeals Committee.
- Develops Building Department policies related to Building Code and Municipal Code administration.
- Advises contactors in the development of Staging and Parking Plans for large projects, prior to submission to the City.
- Assists in the development and implementation of the Building and Planning Department's

- processing software.
- Determines the amount of construction damage deposits and processes the return of deposits at project conclusion.
  - Provides comments to the Planning staff for inclusion in Planning Conditions of Approval during internal review process.
  - Maintains and updates City Local Hazard Mitigation Plan (LHMP).
  - Serves as City's designated ADA Coordinator (NEW RESPONSIBILITY).
  - Performs related duties and responsibilities as required.

## **KNOWLEDGE AND ABILITIES**

### **Knowledge of:**

Thorough knowledge of federal, state, county, and City codes and ordinances relating to: building construction and structural requirements; types of building materials and variations in their quality; modern methods of building construction; acceptable health, safety, and fire standards in building construction; principles and techniques of building inspection; code enforcement and plan checking.

### **Ability to:**

- Administer City ordinances in a self-confident but courteous manner with a demanding public.
- Work under oversight of the public and elected city officials.
- Apply Codes to private construction in difficult topographical situations (e.g. steep hillsides, narrow roads, and limited parking).
- Communicate well both orally and in writing.
- Compose letters and reports using word processing and email software.

### **Physical ability to:**

- Work at a computer keyboard with a mouse for an average of 5-6 hours per day.
- Perform all aspects of building inspection services, which requires: walking on level, rough, and slippery surfaces; reaching twisting, turning, kneeling, bending, stooping, squatting, crawling, and grasping; fine coordination when measuring designated areas for proper conformance; dexterity in climbing up to roofs and on tall ladders, walking on roofs, and crawling under houses; near and far vision when comparing onsite construction conformance to approved plans; lifting, pushing, and moving barriers weighing greater than 25 pounds; making inspections in all weather conditions including wet, hot, and cold; working near and around power, noise, vibration producing tools, moving vehicles, and heavy equipment; maintaining alertness to avoid mechanical, electrical, and traffic hazards.
- Write, stand, reach, twist, turn, and stoop in performance of daily office activities.
- Use near and far vision in reading, reviewing plans, and using the computer monitor.
- Use hearing when working on the phone and avoiding hazards on job sites. Using speaking when communicating with groups and individuals.
- Lift, drag, and push files, paper, and documents weighing up to 20 pounds.
- Sustain prolonged periods of concentration to compose documents and perform analytical work amidst a visually and audibly distracting open office environment with frequent interruptions.

## **MINIMUM QUALIFICATIONS**

- Five years experience in building inspection and Code administration; practical knowledge

- of the Code enforcement process
- Building Official, Plans Examiner, and Building Inspector certifications (required by State law).
  - Possession of a Class C California Driver's License and an acceptable driving record.
  - Some college background is preferred, particularly in a technical field related to building inspection and building code administration.

*(Amended 12/13/2010.)*

## **10.2.6      CITY PLANNER**

**CLASSIFICATION:** Exempt (salaried), at-will, full-time position.

**DEPARTMENT:** Planning/Building

### **POSITION SUMMARY**

This position is responsive to a highly involved and educated community that holds the City organization to a high standard of service and accountability. Design review and permitting of renovation projects large and small (requiring administrative approval or action by the Planning Commission) consume a significant amount of the City Planner's time.

This senior management position reports directly to the City Manager and is responsible for implementing all aspects of the City General Plan, Zoning, Architectural Review and Subdivision Ordinances, and implementing the state and federal planning and affordable housing laws, rules and regulations.

With limited support staff, the City Planner meets with applicants, makes site visits, reviews plans and specifications, evaluates neighborhood and community impacts, writes comprehensive staff reports, and presents well reasoned recommendations to the Planning Commission. Depending on the size and type of project, design review approvals are handled at either the administrative level or by the seven-member Planning Commission which holds hearings on a monthly basis.

The City of Belvedere is 99.9% residential and completely built out.

### **DUTIES AND RESPONSIBILITIES**

- Manages, supervises, coordinates, researches and analyzes planning, zoning, and affordable housing programs.
- Reviews multiple projects daily. These can range from a simple home improvement project to the demolition of a small, older home and its replacement by a new executive residence designed by a world-class architect.
- Develops, reviews, updates, and implements the General Plan, the zoning ordinance, design review ordinance, subdivision ordinance, historic preservation ordinance, other planning documents, and other City Council policies.
- Assists property owners, architects, builders, and attorneys with processing applications and meeting planning requirements, responding through written correspondence, with phone, or in person at scheduled appointments or on a walk-in basis
- Reviews building permit plan submittals for conformance with the approved design.
- Prepares and administers the department budget.
- Prepares and presents reports, statistical analyses, proposals and special projects at meetings of the Planning Commission, City Council, Historic Preservation Committee, and special committees and provides professional assistance on a variety of City matters to these bodies.
- Coordinates with other City departments and works on planning related issues with local, State, and Federal agencies.
- Performs related duties and responsibilities as required.

## **KNOWLEDGE AND ABILITIES**

### **Knowledge of:**

- Comprehensive knowledge of modern principles, practices, techniques and laws related to urban planning, housing and community development.
- Working knowledge of California planning, zoning and development laws, the California Environmental Quality Act and the State Subdivision Map Act.
- General knowledge of architecture and landscaping, building codes, budgeting procedures, principles and practices of supervision, and principles and techniques of providing effective customer service.
- Strong design sense and an understanding of the unique residential character of Belvedere.
- Experience with General Plan and Zoning Code amendments, CEQA interpretation and application, affordable housing requirements and reporting, land use and regulatory issues effecting waterfront communities and constraints imposed on properties located within FEMA designated Flood Zones.

### **Ability to:**

- Organize, direct, and implement a current and advanced planning and zoning program in compliance with Federal, State, and local rules, laws, and regulations.
- Perform zoning, environmental, and architectural design review by comparing project characteristics to defined limits, policies and thresholds.
- Effectively communicate technical, architectural and design, and procedural information and concepts to persons of varying backgrounds, both verbally and in writing.
- Make lucid and concise but complete oral reports at public meetings and to field questions from commission members and the public.
- Apply policies and regulations consistently and fairly.
- Establish procedures for the communications and enforcement of City policies and regulations.
- Formulate decisions on a continual basis, using good judgment, regarding such things as the appropriate level of project review, how to mitigate potential environmental or social impacts, and how to distribute department resources to manage a heavy workflow and meet multiple deadlines.
- Provide excellent customer service while helping to reverse any public misconceptions regarding the planning process or the goal of public officials and staff to serve the best interests of the entire community.
- Use word processing, spreadsheet, and email software to prepare a variety of written materials.

### **Physical ability to:**

- Sit and stand for prolonged periods and to work at a computer keyboard with a mouse for an average of 4 hours per day.
- Write, reach, twist, turn, and stoop in performance of daily office activities.
- Use near and far vision in reading, reviewing plans, using the computer monitor, and looking at property.
- Use hearing and speaking in communicating with individuals and groups and working on the phone.
- Lift, drag, and push files, paper, plans, and documents weighing up to 20 pounds.
- Visit properties and make site reviews in all weather conditions including wet, hot, and cold.

- Work irregular or extended hours to attend various committee meetings.
- Work with constant interruptions, and at times, with clients who may be upset when discussing and enforcing City codes.

### **MINIMUM QUALIFICATIONS**

Any combination of experience and education that would likely provide the required knowledge and abilities to perform the essential duties and responsibilities is qualifying, such as:

- A bachelor's degree in urban planning, environmental science, architecture, public administration, geography or a related field. A master's degree in planning is desirable.
- Six years of progressively responsible planning experience in a local government setting. Supervisory experience is highly desirable.
- AICP certification preferred.
- Valid California Class C driver's license and satisfactory driving record.

*(Amended 09/09/2013)*

## **10.2.7      DEPARTMENT SECRETARY II**

**CLASSIFICATION:** Regular, full-time position.

**DEPARTMENT:** Planning/Building

### **POSITION SUMMARY**

Provides first contact customer service to persons visiting the City administration office or calling in on the City's two general phone lines. Provides information regarding City, department or program activities, policies, procedures, and permits. Performs a wide variety of complex office support and secretarial duties for staff, commissions, and committees.

### **GENERAL DESCRIPTION**

The two department secretaries have their work stations at the City Hall front counter. Each is assigned to provide administrative support to either the Planning or Building Department, specified committees, and may also provide support to specified staff members of other departments (typically staff members are responsible for producing most or all of their own paperwork). The Department Secretaries are also cross-trained in one another's duties.

The Planning Secretary reports directly to the City Planner; the Building Secretary reports to the Building Official/Code Enforcement Officer. Supervision of other employees is not a duty of this class.

### **DUTIES AND RESPONSIBILITIES**

- Interviews telephone callers and office visitors, providing them with desired information or referring them to appropriate staff.
- Assists public in completing and filing applications and related materials for various types of permits.
- Receives payments, issues permits and business licenses, and write receipts.
- Serves as recording secretary to the Planning Commission and/or other committees: types agendas and background materials, copies and distributes packets, and processes post-meeting documents. Takes synopsis minutes at Planning Commission and project meetings.
- Types, formats, and distributes a wide variety of documents including contracts, correspondence, reports, and spreadsheets.
- Opens and screens mail.
- Maintains logs, databases, files, and other records and documents.
- Gathers and compiles information for a variety of reports and records.
- Inventories office supplies, compares vendor prices, and places orders.
- Schedules meetings and appointments.
- Generates labels for hearing notices and produces mass mailings.
- Serves as key operator for a variety of office machines.
- Performs related duties and responsibilities as required.



## **KNOWLEDGE AND ABILITIES**

### **Knowledge of:**

- MS Word, Excel, and Office Outlook and considerable experience using these or similar computer programs.
- Modern office methods, practices and equipment.
- Terminology used in municipal planning and building departments.
- Basic mathematics.
- Correct English usage, spelling, grammar and punctuation.

### **Ability to:**

- Type at a minimum rate of 50 words per minute from clear, legible copy.
- Compose synopsis minutes from notes or shorthand, supplemented by cassette recordings.
- Quickly acquire and retain a thorough knowledge of the operations, policies and procedures of the department to which assigned.
- Multi-task phones, visitors, staff, computer work and paperwork.
- Monitor deadlines and legal requirements for compliance with laws and regulations.
- Perform consistently with accuracy and great attention to detail.
- Take responsibility and exercise good judgment in recognizing scope of authority.
- Understand and carry out oral and written directions.
- Maintain effective working relationships with fellow employees.
- Present a clean, neat and professional appearance.
- Exercise good judgment, courtesy, and tact with the public and visitors who may be upset.

### **Physical ability to:**

- Maintain concentration to keep track of and complete multiple tasks in an environment that is often noisy and distracting.
- Sit and work at a computer keyboard with a mouse for an average of 5-6 hours per day.
- Sit and take notes in meetings that may last three to five hours.
- Stand, walk, reach, twist, turn, kneel, bend squat, and stoop in performance of daily activities.
- Grasp, perform repetitive hand movements, and fine coordination in writing receipts and using a computer keyboard.
- Near vision in reading mail, completed forms, and using a computer.
- Hear for communicating on the phone and in person.
- Speak clearly for the purpose of giving concise, accurate and complete information.
- Lift, drag, and push files, binders, plans or other materials weighing up to 25 pounds.

## **MINIMUM QUALIFICATIONS**

Any combination of experience and education that would likely provide the required knowledge and abilities to perform the essential duties and responsibilities is qualifying, such as:

- Graduation from high school or equivalent supplemented by college or business school training in secretarial science, office management, or office technology.
- Two years experience as a secretary, administrative assistant, or office manager, preferably in a position responsible for providing customer service to clients or the public.

## **10.2.8 RECORDS TECHNICIAN/ADMINISTRATIVE ASSISTANT**

**CLASSIFICATION:** Regular, hourly position.

**DEPARTMENT:** Planning/Building

### **POSITION SUMMARY**

The Records Technician/Administrative Assistant is responsible, under supervision, for complex document scanning and processing of records for several departments using the City's Laserfiche electronic data imaging, indexing, and reproduction system. Performs a wide variety of complex office support and secretarial duties for building and planning staff, citizen committees, and other management staff. Relieves the Department Secretaries in performing reception and customer service duties as needed.

### **GENERAL DESCRIPTION**

The Records Technician/Administrative Assistant reports to the City Planner and also receives training and direction from the Building Official, City Clerk, and Finance Officer. Supervision of other employees is not a duty of this class.

### **DUTIES AND RESPONSIBILITIES**

- Scans a wide variety of documents, categorizing them, and entering metadata. Responsible for adhering to complex records retention schedules, records policies, and precise written procedures.
- Performs data entry from planning and building applications and updates same.
- Fills in for Department Secretaries during breaks, vacations, and other occasions when they are away from the front desk for extended periods. In this capacity, screens telephone callers and office visitors, providing them with desired information or referring them to appropriate staff.
- Performs general word processing and produces form letters, notices, agendas, etc.; filing; copying; setting up meetings, etc.
- Composes memos and letters from brief, verbal instructions.
- Compiles mailing lists from electronic sources, edits them, and produces mass mailings.
- Prepares, copies and distributes agenda packets for volunteer citizen committees.
- Assists with the yearly business license billing.
- Performs annual scanning of Finance Department documents.
- Assists Finance Officer with a brief monthly internal auditing function and acts as backup person for bank deposits
- Performs large copying jobs and binding jobs for the City Clerk and Finance Officer.
- Opens and screens mail.
- Inventories office supplies, compares vendor prices, and places orders.
- Performs related duties and responsibilities as required.

### **KNOWLEDGE AND ABILITIES**

#### **Knowledge of:**

- MS Word, Excel, and Office Outlook and experience using these or similar computer programs.

- Modern office methods, practices and equipment.
- Terminology used in municipal planning and building departments.
- Basic mathematics.
- Correct English usage, spelling, grammar and punctuation.

**Ability to:**

- Type at a minimum rate of 50 words per minute from clear, legible copy.
- Quickly acquire and retain a thorough knowledge of the operations, policies and procedures of the planning, building, and records departments.
- Operate a multi-line phone system.
- Monitor deadlines and legal requirements for compliance with laws and regulations.
- Perform consistently with accuracy and great attention to detail.
- Take responsibility and exercise good judgment in recognizing scope of authority.
- Understand and carry out oral and written directions.
- Maintain effective working relationships with fellow employees.
- Present a clean, neat and professional appearance.
- Exercise good judgment, courtesy, and tact with the public and visitors.

**Physical ability to:**

- Maintain concentration to keep track of and complete multiple tasks in an environment that is often noisy and distracting.
- Sit and work at a computer keyboard with a mouse for an average of 5-6 hours per day.
- Stand, walk, reach, twist, turn, kneel, bend squat, and stoop in performance of daily activities.
- Grasp, perform repetitive hand movements, and fine coordination in writing receipts and using a computer keyboard.
- Near vision in reading mail, completed forms, and using a computer.
- Hear for communicating on the phone and in person.
- Speak clearly for the purpose of giving concise, accurate and complete information.
- Lift, drag, and push files, binders, plans or other materials weighing up to 25 pounds.

**MINIMUM QUALIFICATIONS**

Any combination of experience and education that would likely provide the required knowledge and abilities to perform the essential duties and responsibilities is qualifying, such as:

- Graduation from high school or equivalent supplemented by college or business school training in records management, secretarial science, office management, or office technology.
- One year experience as an electronic records technician, permit technician, secretary, or administrative assistant.

*Added 01/07/2008*