



## Customer Relations Assistant

### ***Purpose of the role:***

Under general supervision the Customer Relations Assistant performs a wide variety of administrative support, clerical duties and activities of a general and specialized nature in support of the assigned department, division, or program area; receives and directs telephone calls and visitors; provides information and assistance to the public, council, City staff, and other agencies; receives, routes, and distributes incoming and outgoing mail; performs a variety of records management duties; performs word processing duties; and performs related duties as assigned.

### ***Distinguishing Characteristics:***

This classification performs the full range of general and specialized clerical and office support duties with only occasional instruction or assistance. Assigned work requires the use of judgment in selecting appropriate procedures, conducting transactions with the public, council and staff solving routine and non-routine problems based on knowledge gained through experience. Positions 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. Work is normally reviewed only on completion and for overall results.

***The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.***

- Greets visitors and handles telephone calls in a calm, efficient, professional and courteous manner.
- Compiles, types, formats, edits, proofreads, and prints a variety of documents and forms related to public information activities, press releases, website, social media, notices, reports, general correspondence, agreements, claims, and other specialized documents from rough draft or verbal instructions; composes routine correspondence; copies, disseminates, and posts documents and information as appropriate.
- Assists the public, City staff, and outside groups and agencies by providing information related to specific area of assignment; responds to complaints and requests for information relating to assigned responsibilities; refers callers to appropriate City staff for further assistance as needed.
- Operates a variety of office equipment and utilizes various software applications.

***Essential Duties  
and  
Responsibilities:***

- Compiles, prepares, and enters data into various software applications; creates and maintains information and reports; creates standard statistical spreadsheets; inputs corrections and updates; verifies data for accuracy and completeness; assists in the compilation of reports.
- Maintains accurate and up-to-date office files and records for assigned areas; develops, prepares, and monitors various logs, and files for current and accurate information including logs of documents processed, calls and requests for information; develops, organizes, and maintains filing systems; researches, collects and prepares information for reports.
- Monitors inventories of supplies and materials; prepares purchase requisitions and requests for payment.
- Maintains calendar of activities, meetings, and various events for assigned staff; coordinates activities and meetings with other City departments, the public, and outside agencies; coordinates and arranges special events as assigned.
- Maintains sensitive and confidential information.
- Processes mail including receiving, sorting, time-stamping, logging, and distributing incoming and outgoing correspondence and packages.
- Arranges and attends committee and staff meeting; takes, transcribes, and assures proper distribution of minutes.
- Assists with collecting information for designs and produces newsletters, brochures, and other specialized documents using software applications.
- Assembles agenda packets and ensures files are complete.
- Enters data on agenda items in Legislative History; accesses and enters referral items in the City-wide Referral System; sends referred items to appropriate staff; monitors due dates for completion; enters actions taken.
- Performs related duties as required.

*The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.*

Knowledge of:

- English usage, spelling, grammar, and punctuation.
- Office procedures, methods, and equipment.
- 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.
- Basic principles of business letter writing and report preparation.

Ability to:

**Desired  
Minimum  
Qualifications:**

- Perform a variety of administrative and office support duties of a general and specialized nature for an assigned office.
- Learn the organization, operation, and services of the City and of outside agencies as necessary to assume assigned responsibilities.
- Provide excellent customer service.
- Learn to correctly interpret and apply general administrative and departmental policies and procedures.
- Learn to apply applicable federal, state, and local laws, codes, and regulations.
- Operate office equipment.
- 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.
- Respond tactfully, clearly, concisely, and appropriately to inquiries from the public, City staff, 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.
- Respond and perform assigned duties in the event of a City-declared emergency.

**Competencies:**

- Results Oriented
- Customer Focused
- Flexible/Adaptable
- Problem Solver and Decision Maker
- Planner and Organizer
- Technically Knowledgeable

*Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

**Education and  
Experience  
Guidelines:**

**Education/Training:**

Equivalent to completion of the twelfth grade.

**Experience:**

Two years of extensive clerical and customer service experience.

**Licenses; Certificates; Special Requirements:**

A valid Class C California driver's license is required.

*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.*

**Physical and  
Environmental  
Conditions:**

**Physical:** Sufficient physical ability to work in an office setting; sit, stand, walk, reach, twist, turn, kneel, bend, squat, and/or stoop for prolonged periods of time; perform duties requiring grasping, repetitive hand movement, and fine coordination; lift, drag, and push/pull files, paper, and documents weighing up to 25 pounds; and operate office equipment. **Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate office equipment. **Hearing:** Hear in the normal audio range with or without correction.

**Environment:** Standard office setting; frequent interaction with City staff and the general public; some positions work around specialized equipment with exposure to loud, repetitive noise.

*Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not include all** duties performed by individuals within a classification. In addition, specifications are intended to outline the **minimum** qualifications necessary for entry into the class and do not necessarily convey the final qualifications of incumbents within the position.*

*Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.*

Date Adopted: 07/01/17

Date Revised: