

**City of La Quinta
CLASS SPECIFICATION
Management Assistant**

CLASS SERIES	BAND/GRADE/SUBGRADE	FLSA STATUS
Management Administration	B21 - B22	Non-Exempt

CLASS SUMMARY:

This class is the first level in a four-level Management Administration Series. As assigned, incumbents are responsible for providing specialized services and customer service in support of City programs and finance. Incumbents, as assigned, may be responsible for processing receipts and cashing; assisting in budget preparation; collection and disbursement of payments, developing and supporting program operations; performing research; maintaining databases; providing technical assistance and training; and processing claims.

DISTINGUISHING CHARACTERISTICS:

Positions assigned to this classification perform tasks that are generally routine and repetitive in monitoring and processing information or coordinating and implementing programs. Work requires considerable attention to detail and is reviewed by a supervisor for conformance to established requirements.

ESSENTIAL DUTIES:

This class specification represents only the core areas of responsibilities; specific position assignments will vary depending on the needs of the department.

Assists with coordinating department activities such as tracking work and change orders, relaying communications, researching information and providing related support.

Assembles, matches, sorts tabulates, checks numerical data, creates and checks records and logs.

Prepares reports, correspondence and forms.

Maintains records, references, reports, statistics; reviews forms and documents for compliance with operational policies and procedures.

Assists in the acquisition of supplies and equipment.

Provides customer service to other employees and citizens.

Responds to citizen/customer questions and calls.

Performs filing and retrieval of information.

As assigned, serves as a lead to staff to include assigning and monitoring work and providing direction.

Performs other duties of a similar nature and level as assigned.

POSITION SPECIFIC RESPONSIBILITIES MIGHT INCLUDE:

Positions assigned to **Management Assistant (Design and Development)** functions may also be responsible for:

- Processing TOT payments, Short-Term Vacation Rental applications and various associated reports;
- Cross training staff on business license and TOT applications and payments;
- Recording reported monthly TOT tax collections and work with contractor on vacation rental collection data;
- Serving as cashier and customer service support in the Customer Center; and
- Processing and reviewing applications for business licenses.

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Positions assigned to **Management Assistant (CIP/Traffic)** functions may also be responsible for:

- Providing general administrative and bookkeeping support to the Capital Improvement Program and Traffic staff;
- Tracking and processing invoices and payments for the CIP program; and
- Performing duties necessary for the Traffic Operations such as GIS mapping, creating full-size drawings and traffic control plans and preparing and tracking work orders.

Positions assigned to **Account Technician (Finance)** functions may also be responsible for:

- Reviewing requests for payments for accuracy and processing accounts payable, preparing checks for payments and reporting on A/P and wire disbursements;
- Reconciling bank statements;
- Preparing warrants for payment and recording all disbursements;
- Preparing various schedules and reports as requested to support accounting manager;
- Reconciling daily deposits for all departments;
- Processing and reconciling Cash receipts, preparing requests for refunds, handling collection of NSF checks; and
- Assisting with preparation of payroll and related documents (such as timesheets, retirement information, etc.).

Positions assigned to **Community Resources Coordinator (Wellness Center)** functions may also be responsible for:

- Recruiting instructors;
- Developing programs and classes at the Wellness Center and various locations throughout the city;
- Developing partnerships with a variety of community service providers;
- Recruiting and training part-time staff and volunteers;
- Coordinating daily operations in assigned area;
- Developing and coordinating city-wide events;
- Overseeing facility rentals; and
- Conducting outreach and marketing activities, including social media postings and creating event flyers..

Positions assigned to **Management Assistant (Community Resources) (Community Programs, Events, Marketing)** functions may also be responsible for:

- Developing community-related programs;
- Coordinating and development of fitness and nutritional programs
- Oversight and coordination of daily operation of the fitness center area;
- Assisting with marketing and promotion of events and programs; and
- Providing administrative support as requested.

Positions assigned to **Management Assistant (City Clerk's Office)** functions may also be responsible for:

- Serving as Secretary to the Oversight Board and Housing Commission; including preparation and distribution of agenda packets, posting, and taking meeting minutes;
- Compiling election manual, processing candidates' filings, and assisting the Elections Officer to fulfill election duties;

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- Notarizing city documents;
- Performing Laserfiche document archive administrator duties;
- Performing webmaster duties for the department and providing training and assistance to other departments as needed;
- Processing of Requests for Records in accordance with the Public Records Act;
- Reviewing, finalizing, posting, and publication of Council ordinances and resolutions;
- Managing all City Boards and Commissions, including advertising vacancies, processing applications and scheduling for Council interviews and appointments, on-boarding, and yearly tracking of ethics certification requirements and Fair Political Practices Commission requirements (Form 700);
- Managing and tracking agreements;
- Preparing and processing of Requests for Proposal/Qualifications;
- Monitoring budgets, and
- Processing records retention projects as assigned.

Positions assigned to **Management Assistant (City Manager's Office)** functions may also be responsible for:

- Monitoring legislative items, providing recommendations, and writing letters on the City's position;
- Creating spreadsheets, monitoring budgets, and creating contract tracking databases; and
- Engaging in economic and business development efforts including outreach, lead generation, and preparation of materials connected to economic development related agreements.

Positions assigned to **Finance Assistant** functions may also be responsible for:

- Providing responsible, complex secretarial and administrative support to the Finance Director , Investment Advisory Board and Finance Department;
- As needed, serving as backup for reviewing requests for payments for accuracy and processing accounts payable;
- Preparing and maintaining various service contracts, coordinating annual sale of surplus items;
- Implementing and managing the purchasing module and function; and
- Overseeing timekeeping management for all City staff.

TRAINING AND EXPERIENCE:

High School Diploma or GED and two (2) years experience related to area of assignment. Or an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

LICENSING/CERTIFICATIONS:

- Some positions may require valid California Class C Driver's License.

KNOWLEDGE OF:

- Modern office procedures;
- Modern office equipment;
- Program coordination;
- Proper English usage, grammar and punctuation;
- Principles of customer service;

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- Basic budgetary principles;
- City policies, rules and regulations, operations, procedures and precedents of assignment; and
- Supervisory principles, as assigned.

Finance/Accounting, Design & Development & CIP/Traffic positions also require knowledge of:

- Principles of basic accounting/bookkeeping;
- Computer accounting applications;
- Basic governmental accounting and budgeting; and
- Methods of receiving and accounting for funds.

Community Resources positions also require knowledge of:

- Principles of marketing, community service, recreational programming and cultural activities;
- Needs, interests and requirements of the community; and
- Available local agencies, organizations and providers of public service resources.

SKILL IN:

- Tact, diplomacy and customer service;
- Comprehending and correctly using a variety of informational documents including logs, ledgers and financial records;
- Preparing documents and records with a high degree of accuracy;
- Data entry;
- Basic business math (addition, subtraction, division, multiplication, percentages);
- Operating a computer and relevant software applications;
- Operating modern office equipment;
- Some assignments may require prioritizing and assigning work; and
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.

ADA AND OTHER REQUIREMENTS:

Positions in this class typically require: standing, walking, fingering, talking, hearing, seeing and repetitive motions. Some assignments may require occasional pushing, pulling, lifting,

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

NOTE: The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.

CLASS HISTORY INFORMATION:

Draft prepared by Fox Lawson & Associates, a Division of Gallagher Benefit Services (DT) (3/2014)

Revised by City of La Quinta (1/2016)

Revised by City of La Quinta (2/2017)