

## **Administrative & Accounting Services Specialist**

### **Grade 6**

#### **Position Summary:**

The Administrative & Accounting Services Specialist plays a key role in managing administrative support functions, including budgeting and financial operations, enterprise resource systems, legislative processes, office administration, and project management within the Community Development Department (Planning & Development; Inspections, and Assessors divisions). This position is responsible for managing agendas and legislative processes, ensuring compliance with statutory requirements, and maintaining communication with elected officials, staff, and the public. Collaboration with administrative staff in engineering, clerks, legal, and customer service is essential to maintaining smooth departmental operations. The incumbent works under the general direction of the Director of Community Development.

#### **Key Responsibilities:**

##### **Financial & Budget Administration**

- Coordinates the development, monitoring, and reconciliation of department budgets. Resolves and troubleshoots budgetary inconsistencies. Monitors office expenditures, prepares inquiries and reports. Reconciles department revenues on various platforms. Reviews and approves refund requests and payments.
- Approves payment vouchers and credit card transactions, ensuring compliance with financial policies.
- Manage accounts payable and receivable, coordinating with relevant departments for approvals.
- Maintain accurate financial records and prepare reports as needed.

##### **Office Operations & Technology Coordination**

- Oversee office technology needs, ensuring proper functionality and standards creation and compliance, in coordination with IT.
- Serve as a liaison for office technology upgrades and transitions related to communications, ERP, fiscal processes, and transition to a paperless office. Manage and maintain database and software systems, projects, and coordinate within and across departments for planning and implementation.
- Establish and maintain administrative policies, procedures, and workflow efficiencies, including interdepartmental processes. Prepare educational materials and provide training.
- Assist Director and Deputy Director in scheduling and calendar management, as requested.

- Ensure brand consistency for all externally facing department communications (forms, applications, letterhead, website, etc.). Coordinate with customer service staff for implementation.
- Collaborate with DPW administrative team on areas of shared office and technology functions.

### **Records & Workflow Management**

- Manages execution of contracts and signatures needed.
- Organize and maintain records management systems. Coordinate process to collect and report city-wide performance metrics.
- Improve document handling processes for efficiency and compliance.
- Coordinate with Clerks Office, Legal Services, Customer Service and Administrative support staff for shared processes & workflows.
- Support legal and customer service teams with related administrative record-keeping tasks.

### **Legislative Process Management**

- Manages agendas and related processes for City Plan Commission, Community Development Committee, Appleton Redevelopment Authority, Joint Review Board, along with other subcommittees, internal work groups, and ad hoc groups as projects and tasks arise. Coordinate and mentor customer service staff who are delegated/assigned as leads for the Historic Preservation Commission, CDBG Advisory Board, Appleton Public Arts Committee, Board of Zoning Appeals, and backup for all other department-staffed committees.
- Files all necessary applications and legal documents related to legislative actions with the Clerk's Office, coordinates statutorily required timelines, notices and other schedules, and completes related administrative and organizational functions. Works closely with staff to ensure cases, resolutions, and/or actions are on track for meetings and regulated deadlines.
- Communicates with alders, appointed officials, applicants, and the public at large related to legislative/planning inquiries and refers to the appropriate staff lead where necessary.
- Maintains current mailing lists and membership information for committees, commissions, boards, etc. Manages process where staff can view and update shared contacts. Creates process to maintain stakeholder/client lists amongst support staff. Coordinates mass mailings as required/assigned.

### **Program Administration & Special Projects**

- Program support for the Homeowner Rehabilitation Loan Program. Distributes bid specifications, ordering reports from title companies, preparing contracts and loan documents, track program income, project funds and required insurance documentation.

- Maintain, coordinate and train team members on Continuity of Operations Plans (COOP). Serve as dept. lead for safety planning and coordination.
- Lead administrative projects related to office operations and technology.
- Manages the RFP and department procurement processes.
- Collaborate with internal teams and other departments to implement process improvements and efficiencies.
- Oversee website updates for department. Coordinate with customer service team members to make updates.

#### **Qualifications & Skills:**

- Associates in Business Administration, Accounting, Public Administration, or a related field; or any equivalent combination of experience and training which provides the required knowledge, abilities and skills.
- 3-5 years of experience in administrative, budgetary, or financial coordination roles.
- Strong knowledge of administrative/office functions, accounting principles, and project management.
- Proficiency in office technology, records management, and workflow optimization.
- Excellent communication and collaboration skills, especially in a cross functional team environment.
- Ability to manage multiple priorities and work independently.
- Experience in office and government administration.
- Familiarity with financial software and enterprise resource planning (ERP) systems.
- Knowledge of COOP planning and business continuity strategies.
- Ability to maintain confidentiality of sensitive and legal information.
- Ability to multi-task.
- Ability to establish and maintain effective working relationships with other employees, departments, other municipal elected and appointed officials and the public and to deal with public relations problems courteously and tactfully.
- Proficient with technology such as Microsoft office (excel; teams; sharepoint) and emerging AI technology.
- Highly skilled in technology operations of computer software, multifunction photocopy/printer/scanner/fax machines, mail/copy center related equipment and other standard office equipment.
- Strong oral and written communication skills.

- Thorough knowledge of all license/permit processes and the ability to distinguish specific variables for each license/permit type.
- Ability to use a Geographic Information Systems (GIS) Viewer for property information.
- Knowledge of local ordinances, state statutes, departmental rules, regulations, procedures and functions.
- Ability to work autonomously and as part of a team.
- Ability to work accurately and quickly under pressure.
- Ability to prioritize and meet deadlines.
- Ability to understand and effectively carry out oral and written instructions.
- Ability to make decisions in accordance with laws and regulations and apply those to work problems.
- Ability to maintain office records, compile data and prepare accurate reports.