

Executive Secretary

Purpose of the role:

Under general direction, performs a full range of varied difficult, sensitive, highly responsible, and confidential office administrative, secretarial, advanced clerical, technical, and programmatic support functions of a general or specialized nature in support of the City Manager's Office, or a major City department or division, with only occasional instruction or assistance; exercising judgment and initiative, relieves assigned staff of technical, as well as general administrative details; serves as a liaison with other City departments and staff, outside agencies, and the general public; and performs related duties as required.

This is a broad classification with individual positions assigned to specific functional areas; duties and assignments may overlap depending on the operational needs of the department and staffing levels.

Distinguishing Characteristics:

The Executive Secretary classification is distinguished from the Senior Administrative Secretary class in that incumbents in the Executive Secretary class perform a variety of difficult, sensitive, and confidential administrative support duties in support of the City Manager's office, or a major department or division, which require a high degree of independent judgment and a thorough knowledge of City and departmental functions, policies, and procedures. Incumbents in the Executive Secretary class provide complex, diverse, and confidential secretarial, administrative, and support services to the City's elected officials, top executives, and senior managers of major divisions, often in a highly sensitive and rapidly changing environment.

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.

Essential Duties and Responsibilities:

- Performs a wide variety of responsible, complex, and confidential administrative, secretarial, technical, and programmatic duties in support of City Council members, City Manager's Office staff, or to a department head or senior manager of a major City Department or division; independently plan and coordinate assigned administrative support functions and services; relieves staff of technical as well as general administrative work including investigating and answering complaints and providing assistance in resolving operational and administrative problems.
- Plans and organizes work activities; recommends improvements in work flow, procedures, and use of equipment and forms; implements improvements as approved; develops and revises office forms and report formats as required; develops, organizes and maintains filing systems.
- Drafts and/or types, word processes, formats, edits, revises, and prints a variety of documents and forms including press releases, reports, correspondence, memoranda, City Council transmittals, agenda items and reports, agreements, contracts, legal documents,

ordinances, resolutions, technical and statistical charts and tables, and other specialized and technical materials from rough drafts, dictation, modified standard formats, and brief verbal instructions.

- Proofreads, verifies, and reviews materials, applications, records, and reports for accuracy, completeness, and conformance with established standards, regulations, policies, and procedures; ensures materials, reports, and Council packets for signature are accurate and complete.
- Serves as liaison between assigned office and the general public, City staff, and outside groups and agencies; provides general and specialized information and assistance regarding assigned function that may require the use of judgment, tact, and sensitivity and the interpretation of policies, rules, and procedures as appropriate; explains programs, policies, and activities related to specific program area of assignment; receives and screens office and telephone callers; responds to complaints and requests for information relating to assigned responsibilities; refers callers and/or complaints to appropriate City staff for further assistance as needed and/or takes or recommends actions to resolve the complaint; determines the priority and routes incoming correspondence.
- Maintains calendar of activities, meetings, and various events for assigned executive staff; screens requests for appointments; coordinates activities and meetings with other City departments, the public, and outside agencies; coordinates arrangements and sets up meeting rooms; notifies participants; prepares and/or assembles meeting materials.
- Coordinates, makes, processes, and confirms staff travel and other arrangements for conferences and business trips; types itineraries, requests travel advances and compiles expense reports; reconciles credit card invoices.
- Plans and coordinates special meetings and receptions; schedules dates and facilities; oversees preparation and set-up activities; arranges and supervises catering services.
- Provides secretarial and/or administrative support services to managers in assigned office and to appointed boards, committees, and task forces; prepares, assembles, and distributes agenda and information packets for City Council, Council committees, appointed board, and other groups' meetings; distributes meeting notices; attends assigned meetings and prepares minutes; maintains files for committees, task forces, and other groups.
- Participates in the collection, compilation, and analysis of information from various sources on a variety of specialized topics related to assigned programs; participates in the preparation of reports that present and interpret data, identify alternatives, and make and justify recommendations.
- Develops, revises, and maintains standardized and master documents; composes correspondence, reports, and informational materials; assists in designing and producing technical information handouts; copies, disseminates, and posts documents and information as appropriate.
- Maintains accurate and up-to-date offices files, records, and logs for assigned areas; develops, prepares, and monitors various logs, accounts, and files for current and accurate information including

manual and computer logs of specialized or technical documents processed.

- Compiles, prepares, and enters data into a computer from various sources including accounting, statistical, and related documents; creates and maintains computer based tracking information and reports including assigned databases, records, and lists; creates standard statistical spreadsheets; inputs corrections and updates; assists in the compilation of reports.
- Utilizes various computer applications and software packages; develops, enters data, maintains, and generates reports from a database or network system; creates and administers mailing lists; designs, maintains, and utilizes data to develop reports using spreadsheet software; creates, formats, and revises charts, graphs, flowcharts, worksheets, booklets, brochures, and forms using appropriate software.
- Assists in assembling and preparing the annual department budget and contracts; processes budget appropriations for capital projects and professional service contracts; tracks and verifies the allocation of funds; monitors expenditures against budget; processes purchase requisitions and requests for payment; disburses and reconciles petty cash funds.
- Attends to a variety of office administrative details such as establishing and maintaining subject, project and tickler files, directing and implementing records management systems, arranging for the repair of equipment, ordering and maintaining an inventory of office supplies, transmitting information, and maintaining up-to-date reference materials.
- Performs a variety of general accounting and bookkeeping functions; collects and reviews information for completeness and appropriate account information; reconciles differences; prepares notification of invoice adjustment; submits documents for payment.
- Enters new referrals into the City-wide referral system; updates system to record actions taken; generates reports for management review; conducts on-line research; periodically reviews outstanding items in the system for needed action and closure; retrieves items and refers them to appropriate staff for follow-up action and report; distributes proposed legislation and regulations to appropriate staff for review and recommended City positions and action.
- Logs and tracks suggestions received in City suggestion boxes; refers suggestions to departments and staff for response, as directed; follows up to ensure responses are prepared; generates quarterly reports for public review.
- Provides lead supervision and direction to assigned clerical and office support staff; prepares work schedules; provides work assignments, instruction, and training; provides information and feedback to appropriate supervisory staff regarding performance of assigned staff.
- Maintains departmental personnel files; prepares and types personnel documents; enters timesheet information in the City's payroll system; distributes timesheets; maintains attendance and time off records; types evaluation forms as assigned.
- Serves on special committees and task forces.

- Provides backup to other administrative support staff; acts in the absence of an Office Supervisor as assigned.
- 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.

***Desired
Minimum
Qualifications:***

Knowledge of:

- Functions of public agencies, including the role of an elected Council and appointed boards and commissions.
- Rules and procedures governing the notice and conduct of public meetings.
- Organization, operation, and services of the City and of outside agencies as necessary to assume assigned responsibilities.
- Work organization and office management principles and practices.
- Basic principles and practices of supervision and training.
- Office procedures, methods, and equipment including computers.
- Computer applications such as word processing, spreadsheets, and databases.
- Principles and practices of fiscal, statistical, and administrative research and report preparation.
- Principles and practices of sound business communication.
- Principles of business letter writing and report preparation.
- Processes, procedures, and practices of budget preparation and administration.
- Records management principles and procedures including record keeping and filing principles and practices.
- Methods and techniques of proper phone etiquette.
- Mathematical principles.
- English usage, spelling, grammar, and punctuation.
- Customer service and public relations methods and techniques.

Ability to:

- Perform a full range of varied difficult, sensitive, highly responsible, and confidential office administrative, secretarial, advanced clerical, technical, and programmatic support functions of a general or specialized nature in support of the City Manager's Office or a major City department or division with only occasional instruction or assistance.
- Understand the organization and operation of the City and of outside agencies as necessary to assume assigned responsibilities.
- Understand, interpret, and apply general and specific administrative and departmental policies and procedures.
- Interpret and apply applicable federal, state, and local laws, codes, and regulations.
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
- 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.
- Take and transcribe dictation, if required by the position, at a speed necessary for successful job performance.

- Participate in researching, compiling, analyzing, and interpreting data.
- Prepare clear, accurate, and concise records and reports.
- Establish, organize, and maintain a variety of specialized files and records.
- Independently prepare correspondence and memoranda.
- Provide lead supervision and training to assigned staff.
- Perform mathematical calculations.
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
- Organize, set priorities and exercise sound independent judgment within areas of responsibility.
- Plan and organize work to meet deadlines, needs, expectations, and rapidly changing priorities of elected and appointed officials.
- Respond tactfully, clearly, concisely, and appropriately to inquiries from the public, press, or other agencies on sensitive issues in area of responsibility.
- Exercise good judgment and maintain confidentiality in maintaining critical and sensitive information, records, and reports.
- 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:

- Strategic Thinker
- Results Oriented
- Customer- Focused
- Flexible/Adaptable
- Planner and Organizer
- Interpersonally Effective
- 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. Supplemental specialized or college level course work in business administration, office management, secretarial science, or a related field is highly desirable.

Experience:

Five years of increasingly responsible office administrative or secretarial experience. Experience in a municipal government setting is highly desirable.

Licenses; Certificates; Special Requirements:

A valid class C California driver's license.

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, City officials, officials of other governmental agencies, staff, community organizations, interests groups, vendors and suppliers, and the public.

*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: 7/5/03

Date Revised: 7/1/07

Revised 7/1/07: Added criteria to include "providing support duties for a major division".