

EXECUTIVE/FISCAL SECRETARY

DEFINITION

Under general direction assists top level administrators with administrative detail; performs highly responsible bookkeeping, secretarial, and clerical functions including preparing, maintaining, checking, and correcting financial and statistical records; researches, organizes, and prepares complex reports; takes and transcribes dictation; and performs related work as required.

CLASS CHARACTERISTICS

This single position class provides critical bookkeeping, secretarial and clerical support to Assistant Superintendent, Business Services, and Director, Fiscal Services. Incumbent is expected to work with little supervision, be flexible in performing assignments, and use considerable initiative in the development of procedures and the resolution of problems encountered in the course of work.

LICENSE REQUIRED

Some positions may require possession of a valid and appropriate California driver's license. Certified as a Notary Public.

EXAMPLES OF DUTIES

Establishes and maintains annual, monthly, and daily calendars of activities of division; establishes and prepares schedules; relieves administrators of office detail. *E*

Prepares and processes complex materials which require the review of source material; compiles a variety of narrative and/or statistical reports locating sources of information and ensuring timely submission of material. *E*

Prepares board agenda items; researches, compiles, and prepares material for Board of Trustees. *E*

Accesses computer to enter, extract, compile, and arrange fiscal data. *E*

Assembles, organizes, and presents data required for supervisor to make decisions. *E*

Receives financial or statistical documents, screening for accuracy and adherence to legal and procedural requirements. *E*

Coordinates the flow of information to Information Services for some projects. *E*

Takes and transcribes dictation. *E*

Initiates replies to routine and difficult correspondence. *E*

EXAMPLES OF DUTIES (cont.)

Establishes, maintains, and operates complex files including cross filing and confidential files; sets up suspense file and follows up outstanding actions; purges files per schedule and category. *E*

Coordinates activities of various departments within division when engaged in concurrent projects and the technical aspects of clerical work. *E*

Refers matters requiring policy decisions to immediate supervisors. *E*

Provides information on activities, policies, laws, and procedures within and without the division. *E*

Schedules and obtains facilities, participants, materials, amenities for meetings, conferences, and visitors. *E*

Disseminates reports of meetings, conferences, and telephone calls; designs and prepares forms; distributes notices. *E*

Requisitions supplies, material, and equipment. *E*

Greets and screens visitors and callers. *E*

Performs related work as required.

MINIMUM QUALIFICATIONS

Knowledge of:

1. Fundamentals of time management;
2. Modern office management techniques, equipment, and procedures including the preparation of business correspondence, fiscal reports, and filing;
3. Advanced English usage, spelling, grammar, and punctuation;
4. Modern word processing;
5. Business correspondence composition and report preparation;
6. Data processing as it relates to financial and statistical record keeping;
7. Applicable state laws, district policies, procedures, and other regulations governing the area of assigned responsibility;
8. Basic principles of supervision and training; and
9. Mathematics to and including use of fractions and percentages.

Ability to:

1. Perform highly responsible administrative detail and complex clerical work involving independent judgment using a computer terminal for word processing;
2. Compile and prepare clear and comprehensive reports and keep complex fiscal records;
3. Use computer terminal to enter, extract, compile, and arrange financial data and input corrections as required;
4. Read, understand, interpret, and explain policies of regulations, administrative reports, contracts, and government guidelines;

Ability to: (cont.)

5. Compose correspondence and minutes of meetings;
6. Perform arithmetic calculations requiring speed and accuracy, comparing numbers, detecting and correcting errors;
7. Analyze situations and develop effective courses of action;
8. Devise and adapt work procedures and record keeping systems to meet changing organizational or specialized needs;
9. Communicate clearly, both orally and in writing;
10. Operate a calculator by touch;
11. Keyboarding with accuracy at an acceptable rate of speed;
12. Operate and use word processing, computers, and dictation equipment effectively with speed and accuracy;
13. Understand and carry out oral and written instructions;
14. Establish and maintain effective relationships with those contacted in the course of work; and
15. Maintain work pace appropriate to given workload.

EDUCATION

Individuals possessing the knowledge, skills, and abilities listed above are considered to possess the necessary education.

EXPERIENCE

Recent responsible administrative secretarial experience in an executive office which included the composition of correspondence and reports, the maintenance of financial or statistical record keeping requiring the monitoring of complex fiscal records and the composition of financial reports; the handling of administrative detail with considerable independence of action, a large volume of difficult record keeping, and the maintenance of a complex filing system.

WORKING CONDITIONS

Environment:

Office environment; subject to constant interruptions and driving a vehicle to conduct work.

Physical Abilities:

Moderate lifting and carrying of objects weighing up to 25 pounds; dexterity of hands and fingers to operate standard office equipment; reaching overhead, above the shoulders and horizontally to reach shelves; bending at the waist to retrieve files; hearing and speaking to exchange information; seeing to read and transcribe correspondence; sitting for extended periods of time.

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4/88
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