

FINANCE EXECUTIVE SECRETARYDEFINITION

Under general supervision, performs varied and complex technical, clerical, secretarial and administrative support activities for the head of the Finance & Management Services Agency.

ESSENTIAL FUNCTIONS INCLUDE BUT ARE NOT LIMITED TO:

Makes appointments, introduces callers, secures information and/or answers questions, or refers to appropriate individual. Prepares and types correspondence and statistical reports. Operates personal computer using business software such as Microsoft Word, Excel, PowerPoint, Publisher and Outlook. Coordinates calendar, schedules, and meetings. Makes travel arrangements, prepares trip folders and reconciles expenses. Assists in the preparation of budget estimates and budget reports. May serve as the Parking Coordinator for the Agency. May take and transcribe dictation. May be required to obtain and maintain a commission as a notary public with the State of California. Writes letters either independently or in accordance with oral and written directions. May supervise the work of a clerical staff. Performs other related functions as assigned.

DISTINGUISHING FEATURES OF THE CLASS

This single position class performs responsible and difficult clerical work, which normally includes routine administrative activities and responsibility for independent action requiring the exercise of judgment in making decisions in accordance with the policies and practices of the department. An employee in this class usually is immediately subordinate to a department head and may exercise supervision over one or more employees assisting with the more routine clerical details.

MINIMUM BASIC REQUIREMENTS:

Completion of probation with the City of Santa Ana and three years of experience in a complex clerical or technical support classification; or any equivalent combination of experience and education which provides the following knowledge and abilities:

Knowledge of: Business English and spelling; business letter writing and business forms; office practices, procedures and equipment including substantial knowledge of computer operations and applications.

Skill in: Advanced proficiency in the use of Microsoft Word, Excel, PowerPoint, Publisher and Outlook

Ability to: type at a corrected speed of 50 wpm; perform difficult clerical work; follow oral and written directions; deal tactfully, but effectively, with the public; effectively supervise and direct the work of others as may be required.

CHARACTERISTICS OF SUCCESSFUL PERFORMERS:

The successful Finance Executive Secretary is a well-organized self-starter who works well independently and completes complex tasks with a minimum of instruction. This individual is highly dependable and easily coordinates a wide variety of tasks and levels of priority and is comfortable working in a fast-paced environment with strict deadlines. This successful incumbent enjoys producing a large volume of statistical typing, ensuring its accuracy. The Finance Executive Secretary is helpful, pleasant and customer service oriented yet very aware of the importance of confidentiality and handles sensitive matters with discretion.

Class title change from Senior Finance Secretary per Council Resolution No. 2000-074,
effective 12-1-00

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