

**SECRETARY 1116**  
**Task List 2020**

**Reception and Telephone Duties**

1. Greets visitors such as City personnel and other guests entering reception area in order to provide information verbally or refer the visitors to the appropriate person or location.
2. Greets visitors such as City personnel and other guests who have been referred by the receptionist, or on behalf of supervisor, in order to provide information verbally or refer the visitors to the appropriate person or location.
3. Answers telephone and determines nature/purpose of the call in order to provide information, refer the caller to the appropriate person or organizational unit, or convey the message via written (i.e., email, handwritten note) or oral means.
4. Answers telephone calls on behalf of supervisor, or which have been referred by receptionist in order to provide information, refer the caller to the appropriate person or location, or take a message via handwritten note or email.
5. Calls a variety of persons and/or agencies in order to convey or obtain information, including making or cancelling appointments or meetings, and placing orders for equipment or supplies.
6. Answers questions regarding topics such as procedures, rules, regulations, department functions, and City services with members of the public, City employees, and/or other outside agencies in person, by telephone or email and/or in person.

**Mailing/Emailing and Sorting Duties**

7. Sorts incoming hard copy mail such as letters or memos in order to determine addressee and distribute it to the intended recipient or function.
8. Opens, reads, and determines the disposition of incoming mail such as letters or memos in order to forward to the appropriate person or function according to the nature of the content of the correspondence.
9. Reads supervisor's mail/emails, as authorized, in order to decide on appropriate disposition, or forward mail to the appropriate person or function according to the nature of the correspondence.
10. Searches for specific documentation such as letters, reports, and/or memos in order to attach to correspondence to serve as an aid to the recipient in determining the appropriate action and/or disposition.

**SECRETARY 1116**  
**Task List 2020**

11. Assembles, mails/emails, and/or distributes written/digital material such as agendas, reports, studies, personnel investigations, information packets regarding department services, functions and/or operations, notifications or cancellations to appear and minutes from meetings, or hearings in order to ensure that appropriate parties are notified.

**Reviewing and Checking**

12. Receives, sorts, and organizes documents such as letters or memos according to department procedures in order to have them included or listed in a report, agenda or commission board action report.
13. Proofreads and edits material such as memos, agendas, minutes from meetings, forms, and reports in order to locate and correct grammatical, spelling, punctuation errors, and determine whether the necessary information is complete and accurate.
14. Reads, reviews, and approves/disapproves routine reports, memos, letters, and/or forms for supervisor and/or staff such as invoices, audits, bills, travel orders, timesheets, petty cash vouchers, voucher control forms, and equipment and maintenance reports in order to facilitate office operations.
15. Checks organizational and scheduling systems such as a tickler file, or digital equivalent, each day in order to determine the need to remind supervisor and/or staff of necessary information in a timely manner.
16. Performs basic arithmetic calculations such as addition, subtraction, multiplication, division, and percentage calculations in order to provide and/or verify numerical information.
17. Manages calendar for supervisor and/or staff such as scheduled appointments and meetings, project due dates, training sessions, and staff schedules in order to provide a reminder.

**Transcription**

18. Takes notes for documents such as letters, speeches, and memoranda of confidential, and/or highly sensitive information in order to produce an accurate record.
19. Takes accurate notes of discussions at events such as meetings, conferences, hearings, and board or commission meetings in order to accurately record the proceedings and the testimony.

**SECRETARY 1116**  
**Task List 2020**

**Filing and Recording**

20. Files, by alpha, numeric order or other appropriate method, a variety of work materials (digital or hard copy format) such as reports, letters, personnel folders, charts, maps, leases, business cards, timesheets, graphic designs, pamphlets, and brochures in order to maintain records of the section's operations and/or activities.
21. Reviews and determines the need to retain and/or dispose of documents such as records or memos maintained in divisional files according to City record retention policies in order to maintain an efficient record keeping system.
22. Orders office supplies such as paper, pens, pencils, office forms, copying machine materials, business cards, safety supplies and engineering design supplies in order to maintain the quantities needed to operate efficiently and safely.
23. Distributes and manages materials and/or equipment to staff personnel and records information such as the name of employee, date of issuance, item issued, and date item is to be returned in order to maintain control of the materials charged out.
24. Creates and maintains a correspondence log for supervisor, group and/or office.

**Operates Machines**

25. Operates a computer and/or typewriter to produce material such as letters, reports, memos, budgets, charts, agendas, minutes from meetings, and financial statements in order to produce material according to a standardized and accurate format.
26. Operates a computer in order to store, input, and retrieve information from systems such as timekeeping and payroll, criminal justice systems, construction project, stored reports and formats, and also to send messages.
27. Operates a telecommunications device such as a desk phone, mobile phone, laptop, tablet or other electronic device in order to send voice messages, emails or texts and relay accurate current information.
28. Operates a calculator or spreadsheet to perform arithmetic calculations such as addition, subtraction, division, multiplication, and for calculation of percentages in order to provide and ensure the accuracy of information.
29. Operates duplication devices such as a copier, scanner, fax machine and/or other office equipment as required.

**SECRETARY 1116**  
**Task List 2020**

**Written Communication Skills**

30. Composes, responds to, and manages reports summarizing information from various sources such as inventory sheets, timesheets, stock logs, mileage reports, purchase orders, financial statements, and uncompleted service requests in order to provide management with a report of specific activities.
31. Composes, responds to, and manages digital and hardcopy correspondence such as emails, letters, memos, agendas, and reports in order to request and/or convey information to others.
32. Writes work procedures and makes revisions to existing ones such as internal and/or City operating procedures and functions, and updates telephone directory information, including personnel assignments, titles, and locations in order to maintain accurate current information and to standardize work methods.
33. Writes detailed reports such as performance evaluations, positions descriptions, requests and/or recommendations for service, personnel or equipment items or needs, incidents of sick and/or injured employees, disciplinary actions, and responses to grievances and/or discrimination complaints in order to report the information to superior and/or administrative personnel.
34. Reads written material to extract specific types of information from reports such as letters, memos, meeting minutes, and newsletters in order to condense and/or summarize into a new report.
35. Creates, completes and manages forms, such as customer request forms, questionnaires, payment requests, installation and/or service requests, timekeeping correction documents, and status reports in order to report and manage information of a routine nature.
36. Creates, completes, and manages statistical and numerical reports for such items as capital projects, improvement projects, comparisons, and analytical reports in order to report on-going or completed work.
37. Creates, edits and/or manages written material such as letters, reports, memos, and speeches provided by superior and/or staff onto a computer word processing program in order to produce accurate records.
38. Creates, edits and/or manages documents, which include numerical data and/or graphic material, such as PERT charts, critical path line charts, organization charts, budgets, surveys, and tables in order to produce clear accurate reports.

**SECRETARY 1116**  
**Task List 2020**

39. Creates, edits and/or manages reports such as letters, memos and agendas in order to complete work operations.

**Interpretation of Policies and Decision-Making**

40. Interprets general policies, rules and procedures such as CAO rules, Mayor's Directives, Administrative Code, Civil Service Commission Rules, Department policies, the Brown Act and MOU's in order to promote and maintain an effective workplace and meet set objectives.
41. Reviews reports or publications such as City Council, committee or commission board agendas, for pertinent items in order to call them to the attention of the appropriate person.

**Written Communication Skills**

42. Interviews candidates and makes a hiring decision or recommendation, for positions which are under line or functional supervision such as support personnel order to maintain staffing needs.
43. Verbally reports on work-related matters such as employee performance, personnel issues, operating policies, work procedures, training activities, and office operations in order to report on-going activities and/or formulate appropriate courses of action.
44. Verbally obtains information from employees about work-related situations such as absenteeism, work productivity, punctuality and interpersonal contacts in order to determine the need for/recommend corrective action.
45. Meets with other employees to discuss matters of mutual concern such as work operations, on-going projects, personnel matters, and policy or procedural changes in order to exchange information and improve operations.
46. Verbally requests additional materials and/or personnel such as those from other sections, order to obtain needed resources.

**Supervision**

47. Trains, develops, cross-trains and mentors clerical personnel such as administrative clerks in order to ensure completion of work according to established procedures and the efficiency of the work flow and to facilitate evaluating work performance.
48. Plans, reviews, assigns, and manages the work of a clerical staff such as administrative clerks in order to ensure the efficiency of the work flow and to facilitate evaluating work performance.

**SECRETARY 1116**  
**Task List 2020**

49. Distributes work assignments such as typing, filing, mail distribution and duplication work to clerical personnel in order to ensure an equitable and efficient workflow.
50. Manages schedules for clerical staff such as administrative clerks in order to meet staffing needs effectively and ensure office coverage.
51. Directs or informs others such as inside and outside customers where to look for and obtain a variety of information.
52. Supervises those who provide information to the public regarding matters such as department procedures, policies, rules, and general information, in order to ensure the accuracy of information given.
53. Supervises those performing or assisting in sub-professional accounting activities such as timekeeping, maintaining accounting ledgers, computing wages, taxes, commissions and payments, and balancing cash on hand against receipts in order to ensure the accuracy of the information.
54. Supervises employees operating equipment as defined under Operating Machines section.
55. Evaluates the performance of employees supervised such as administrative clerks in order to ensure that performance standards are met.
56. Counsels, advises, and/or commends employees verbally and/or in writing regarding work-related activities such as performance, punctuality, attendance, interpersonal working relationships, and work operations in order to maintain satisfactory work performance, promote high morale, and/or resolve minor differences.