

1. Position Code
EXCSECEG99N

State of Michigan
Civil Service Commission
Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete this form as accurately as you can as the position description is used to determine the proper classification of the position.

2. Employee's Name (Last, First, M.I.)	8. Department/Agency Licensing and Regulatory Affairs
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) Corporations, Securities & Commercial Licensing Bureau
4. Civil Service Classification of Position Executive Secretary, Grade E10	10. Division Corporations Division
5. Working Title of Position (What the agency titles the position) Executive Secretary	11. Section Director's Office
6. Name and Classification of Direct Supervisor Alexis Lupo, State Division Administrator 17	12. Unit
7. Name and Classification of Next Higher Level Supervisor Linda Clegg, Senior Management Executive 19	13. Work Location (City and Address)/Hours of Work 2407 N. Grand River Avenue, Lansing 8:00 a.m. to 5:00 p.m. with remote if applicable
14. General Summary of Function/Purpose of Position This position serves as confidential secretary/management assistant to the Director of the Corporations Division for the Corporations, Securities & Commercial Licensing Bureau. The position performs a full range of management assistant and secretarial duties. As the confidential secretary/management assistant, duties include coordinating the office management activities for the division and making recommendations regarding improving efficiency. Provide management support for Director of the Corporations Division, including receiving, transmitting and processing privileged or confidential information to pre-authorized individuals; make arrangements and collects materials for meetings and conferences; attends meetings representing director's viewpoint; assist in creating and revising forms and recommends or proposes changes to procedures, formats and standards for office correspondence.	

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15. Please describe your assigned duties, percent of time spent performing each duty, and explain what is done to complete each duty.

List your duties in the order of importance, from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary of Duty 1

% of Time 80%

This position serves as confidential secretary and management assistant to the Director of the Corporations Division for the Corporations, Securities & Commercial Licensing Bureau. The secretary exercises judgment in determining course of action consistence with superior's viewpoint or Bureau and Department policies and procedures. Acts as executive assistant to the Director of the Corporations Division. Screen incoming correspondence, handle personally or forward to Director and staff as appropriate. Prepares reports and correspondence. Respond to telephone inquiries or route to appropriate person. Perform related work as assigned.

Individual tasks related to the duty.

- Performs a variety of administrative and executive support tasks, which may be highly confidential and sensitive.
- Coordinates office management activities for the Director.
- Serves as a liaison between supervisor and departmental personnel, transmits specific information among staff members and transmits privileged or confidential information to pre-authorized individuals.
- Researches, compiles, assimilates, and prepares confidential and sensitive documents and briefs for the Director regarding contents.
- Reads and screens incoming correspondence and reports, makes preliminary assessment of the importance of materials and organizes documents, handles some matters personally, and forwards appropriate materials to the executive and staff.
- Relays supervisor's assignments to staff members and follows up on progress made as assigned.
- Receives and screens incoming calls and visitors, determines which are priority matters, and alerts the executive accordingly. Makes referrals to appropriate executive staff or provides requested information.
- Informs government officials and others of the position of the Director on issues.
- Composes letters and memorandums in response to incoming mail or calls. As liaison between the Director and subordinates or others, exchanges information; transmits directives, instructions, and assignments; and follows up on status of assignments.
- Prepares contracts used by the Division for data subscriptions. Invoices data subscribers and maintains records.
- Provides information to monthly data subscribers.
- Operates computers to produce a variety of documents, charts, and graphs in final form.
- Updates director on status of issues before scheduled meetings.
- Prepares agenda and collects materials for meetings, speeches, and conferences; takes minutes and keeps records of proceedings as required.
- Plans and coordinates arrangements for professional conferences.
- Reviews work area budget proposals, equipment, or supply requests and makes comments or recommendations.
- Open, scans, and distributes mail and answers correspondence requiring knowledge of instructions and guidelines, and anticipates and furnishes material for superior's replies to correspondence.
- Respond to inquiries from public, other agencies, Legislature, and others.
- Coordinates responses to subpoenas.
- Receives and coordinates all correspondence for Division Director.
- Prepares reports and correspondence.
- Maintains files and records of action.
- Maintains policy statements and attorney general opinion reference files.
- Compiles data for performance measures and effectiveness of program.

Duty 2

General Summary of Duty 2

% of Time 10%

Provide management support for Director of Corporations Division, including receiving, transmitting, and processing privileged or confidential information to pre-authorized individuals. Make arrangements and collect material for meetings and conferences. Attend meetings representing superior's viewpoint. Assist in study of office operations and makes recommendations regarding improving efficiency. Assist in creating and revising forms and recommends or proposes procedures, formats and standards for office correspondence. Ensure compliance with Division's Retention and Disposal Policy.

Individual tasks related to the duty.

- Reviews, proofreads, and edits documents prepared for the executive's signature.
- Receive, transmit and process privileged and confidential information, including salary information.
- Schedule meetings, reserve meeting rooms, prepare and collect materials for meetings and distribute to appropriate person.
- Coordinate schedules and maintain calendar.
- Make travel arrangements, request travel advance, direct vouchers and complete travel vouchers.
- Attend meetings.
- Prepare Division forms for printing.
- Prepare Division files for storage and retrieval at the State Records Center pursuant to the State of Michigan and Corporations Division's Retention and Disposal policies.

Duty 3

General Summary of Duty 3

% of Time 10%

Oversight for Division's expenditures, including refunds, purchases of equipment, forms, and supplies. Monitor budget activity. Use procurement card (state credit card) to make purchases for the Division.

Prepare position descriptions, probationary service ratings and transaction requests, prepare training nominations, maintain forms and information files, and provide information to staff which are represented by labor contracts. Set up interviews for vacancies and prepare recruitment letters, maintain confidential files and records regarding medical leave, grievances, FMLA, and accommodation requests. Prepare the timekeeping report and maintain attendance records for the Division.

Perform related work as assigned.

Individual tasks related to the duty.

- Obtain proper approvals for purchases and refunds.
- Use procurement card to pay the Division's bills and to make purchases that cannot be completed on a requisition or direct voucher.
- Identify vendors that have a contract with the state before making purchases.
- Track progress of pending transactions.
- Monitor forms stored at DTMB Warehouse services, request delivery of forms, prepare new forms for printing, order forms, and identify forms to be recycled.
- Prepare documents, reports and correspondence for personnel transactions.
- Prepare final copies of position descriptions, probationary service ratings, training nominations, vacancy notices and recruitment letters.
- Maintain reference information regarding confidential Division personnel and pending transactions.
- Provide personnel related forms and information to Division staff as needed.
- Process timekeeping reports.
- Process management plans, documents, reports and other duties as assigned.
- Collect and coordinate data, format reports, prepare final copies for quarterly and yearly reports.
- Prepare weekly reports and distribute to appropriate recipients.

16. Describe the types of decisions you make independently in your position and tell who and/or what is affected by those decisions. Use additional sheets, if necessary.

Identifying and understanding issues, problems, and opportunities; comparing data from different sources to draw conclusions; using effective approaches for choosing a course of action or developing appropriate solutions; taking action that is consistent with available facts, constraints, and probable consequences.

Clearly, conveying and receiving information and ideas through a variety of media to individuals or groups in a manner that engages the audience, helps them understand and retain the message, and permits response and feedback from the audience.

17. Describe the types of decisions that require your supervisor's review.

Matters of legal interpretation and modifying section policies and procedures.

Management strategy if a specific directive appeared to conflict with bureau or department goals.

Supervisor's review is necessary when issues raised may be sensitive, confidential, or have unanticipated consequences.

18. What kind of physical effort do you use in your position? What environmental conditions are you physically exposed to in your position? Indicate the amount of time and intensity of each activity and condition. Refer to instructions on page 2.

This position usually performs tasks in an office setting and is subject to conditions normally expected in that environment. Travel to other offices may be required. Use of a computer, telephone, sitting, walking, standing, and lifting of files is the extent of required physical effort. In addition, the position involves a substantial amount of reading/reviewing documents in electronic or print format.

19. List the names and classification titles of classified employees whom you immediately supervise or oversee on a full-time, on-going basis. (If more than 10, list only classification titles and the number of employees in each classification.)

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>

20. My responsibility for the above-listed employees includes the following (check as many as apply):

___ Complete and sign service ratings.

___ Assign work.

___ Provide formal written counseling.

___ Approve work.

___ Approve leave requests.

___ Review work.

___ Approve time and attendance.

___ Provide guidance on work methods.

___ Orally reprimand.

___ Train employees in the work.

21. I certify that the above answers are my own and are accurate and complete.

Signature

Date

NOTE: Make a copy of this form for your records.

TO BE COMPLETED BY DIRECT SUPERVISOR

22. Do you agree with the responses from the employee for Items 1 through 20? If not, which items do you disagree with and why?

Yes

23. What are the essential duties of this position?

This position serves as confidential secretary/management assistant to the Director of the Corporations Division for the Corporations, Securities & Commercial Licensing Bureau. The position performs a full range of management assistant, secretarial, and supervisory assignment.

As the confidential secretary/management assistant, duties include coordinating the office management activities for the division and making recommendations regarding improving efficiency. Provide management support for Director of the Corporations Division, including receiving, transmitting and processing privileged or confidential information to pre-authorized individuals; make arrangements and collects materials for meetings and conferences; attends meetings representing director's viewpoint; assist in creating and revising forms and recommends or proposes changes to procedures, formats and standards for office correspondence.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

The position description was updated to reflect that the Bureau is no longer printing mass mailings.

25. What is the function of the work area and how does this position fit into that function?

The Corporations Division promotes economic development and growth by facilitating the formation and development of business entities in the State of Michigan.

The position services as the confidential executive secretarial/management assistant to the Director of the Corporations Division.

26. In your opinion, what are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Educational level typically acquired through completion of high school.

EXPERIENCE:

Secretary Supervisor E10

Five years of administrative support experience, including two years equivalent to advanced (8) level administrative support work, Secretary E8, or Legal Secretary E8; or, one year equivalent to a Secretary 9, Legal Secretary 9, or Senior Executive Management Assistant 9.

KNOWLEDGE, SKILLS, AND ABILITIES:

Written and verbal communication, leading, use of computer and software. Ability to use diplomacy and discretion when giving out information and referring and directing callers and visitors. Knowledge of the regulatory programs under the auspices of LARA. Ability to determine work priorities, make decisions, and take appropriate actions.

CERTIFICATES, LICENSES, REGISTRATIONS:

NOTE: Civil Service approval of this position does not constitute agreement with or acceptance of the desirable qualifications for this position.

27. *I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.*

Supervisor's Signature

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

28. Indicate any exceptions or additions to the statements of the employee(s) or supervisor.

29. *I certify that the entries on these pages are accurate and complete.*

Appointing Authority's Signature

Date