

**State of Michigan
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code

1. SEMA2C36N

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information 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 DEPT OF INS AND FIN SERVICE
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) Office of Consumer Finance
4. Civil Service Position Code Description SENIOR EXEC MGT ASST-2	10. Division
5. Working Title (What the agency calls the position) Assistant to the Senior Policy Executive	11. Section
6. Name and Position Code Description of Direct Supervisor WESTRIN, JAMES E; SENIOR POLICY EXECUTIVE	12. Unit
7. Name and Position Code Description of Second Level Supervisor LUETZOW, AARON E; SENIOR DEPUTY DIRECTOR	13. Work Location (City and Address)/Hours of Work 530 W ALLEGAN ST; LANSING, MI 48915 / 8:00 a.m.-5:00 p.m.

14. General Summary of Function/Purpose of Position

This position serves as executive support to the Office Director and provides administrative and operational support the Office of Consumer Finance. Responsibilities include delegating of assignments to office staff, coordinating completion of assignments and monitoring workflow to ensure compliance in meeting deadlines; maintaining records, reports, and statistical data; coordinate responses to the Office of General Counsel for Freedom of Information Act requests; and providing administrative support in a fast-paced regulatory environment with competing priorities.

Responsibilities include preparing draft correspondence for the Office Director's review, approval, and signature; reviewing, proofreading, and editing correspondence and other professional documents for accuracy, consistency, and clarity prior to distribution. Coordinate and track exchanges of with the Office of General Counsel; manage and maintain confidential and sensitive information; manage calendars and schedules; prepare meeting materials, including taking and maintaining minutes for Mortgage Industry Advisory Board meetings; track assignments and deadlines for office staff; draft routine and specialized correspondence; prepare reports and documents; maintain files and office records; track office staff training and survey reports; track examination survey responses; and perform other related duties as assigned.

Special one-time projects and assignments are frequently assigned to this position, with the expectation that the incumbent exercise independent judgement and initiative in determining appropriate action, personally handling assignments, or coordinating work with other office and department staff as necessary.

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

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary:

Percentage: 40

Provide executive-level administrative and operational support to the Office Director, including coordination of workflow, assignments, schedules, communications, and office operations, which requires considerable knowledge of the Office Director's viewpoint and the department operating policies/procedures.

Individual tasks related to the duty:

- Schedule appointments and maintain calendar.
- Make travel and other logistical arrangements as necessary for office director and office staff.
- Process highly sensitive or confidential material, making decisions on what can or cannot be delegated to other administrative support personnel for processing.
- Screen mail, visitors and callers, determining priority for the office director's attention, those to be delegated to office staff for handling, and independently handling as many as possible based on knowledge of the supervisor's policy direction and interpretation of the various office codes.
- Establish and maintain office filing systems, records, and administrative tracking documents.
- Research options and make recommendations for improving operational efficiency and effectiveness.
- Research, compile, summarize, draft and maintain records pertaining to various reports and statistical data, including the DIFS annual report and quarterly performance measures.
- Prepare, review, edit, and proofread correspondence, reports, presentations, and other professional documents.
- Provide administrative guidance and assistance as requested.
- Responsible for timekeeping (auditing) for office.

Duty 2

General Summary:

Percentage: 30

Coordinate and oversee staff assignments and process all material submitted for the office director's signature.

Individual tasks related to the duty:

- Assign matters to office staff with a deadline for handling; process assignments made directly by office director and act as a liaison with office staff.
- Maintain log of all assignments delegated by position of office director.
- Follow-up on assignments not completed by deadline.
- Review all material for the office director's signature for accuracy and consistency with his/her policy position.
- Obtain additional information on office issues and relay same to office director for resolution.
- Receive, coordinate, assign, monitor, and track office responses to Freedom of Information Act responses.

Duty 3

General Summary:

Percentage: 20

Provide executive administrative support and operational support and assistance to the Office sections as needed.

Individual tasks related to the duty:

- Serve as Recording Secretary for Mortgage Industry Advisory Board and maintain MIAB records.
- Serve as website liaison for the Office of Consumer Finance.
- Assist Licensing section, as assigned, with license processing and document management.
- Represent the Office of Consumer Finance on various DIFS committees.

Duty 4

General Summary:

Percentage: 5

Develop responses for the office director's signature to written or verbal inquiries for information.

Individual tasks related to the duty:

- Research files as necessary and gather information from appropriate office staff with knowledge in the subject area.
- Compose correspondence; take and transcribe dictation as required and use word processing programs.

Duty 5

General Summary:

Percentage: 5

Assist with other related special projects.

Individual tasks related to the duty:

- Complete special projects, including conducting research and analysis and preparing reports and recommendations, as assigned.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

Decisions on what information can be released regarding the office director's position on issues; resolve scheduling conflicts and determine priorities for the office director's attention. These decisions affect office staff, the financial services industry and others having contact.

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

Decisions not covered by supervisor directive, agency policy or guidelines, such as changes to microcomputer software/programs that may affect stored data and report output or revising a process that affects how work is performed.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

Position duties and tasks are performed in a traditional office environment which includes considerable sitting, occasional standing, limited lifting, computer usage and normal office routines.

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

Additional Subordinates

20. This position's responsibilities 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. |

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

Yes.

23. What are the essential functions of this position?

To provide executive secretarial support and administrative assistance to the office director which requires considerable knowledge of the supervisor's viewpoint and DIFS operating policies/procedures in order to coordinate activities, communications and schedules on behalf of the supervisor. Employee in this position operates complex computer hardware/software, processes considerable computer-generated documentation, handles considerable telephone communications and maintains division files. Ability to deal tactfully and effectively with field staff, industry representatives and government officials.

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

Update PD. The duties and responsibilities of this position have evolved to require broader executive-level administrative and operational support responsibilities to the Office Director and the Office Sections. The position has increased responsibility for coordinating workflow and assignments; tracking deadlines and follow-up activities; preparing, reviewing, editing, and proofreading correspondence and other professional documents for the Office Director; coordinating and reviewing documents transmitted between the Office and other areas within the Department; and maintaining confidential and sensitive information. The position also now provides greater operation support related to workflow coordination, records management, FOIA tracking, and office procedures in a dynamic, fast-paced regulatory environment with multiple competing priorities.

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

The Office of Consumer Finance is responsible for issuing licenses and conducting examinations and investigations of non-depository financial institutions under ten consumer finance statutes. This position serves as administrative assistant to the office director of the Office of Consumer Finance.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Education typically acquired through completion of high school.

EXPERIENCE:

Six years of office experience involving administrative support practices, including three years equivalent to an advanced, 8-level, administrative support worker, Secretary E8, or Legal Secretary E8; two years equivalent to a Secretary 9, Legal Secretary 9, or Senior Executive Management Assistant 9; or, one year equivalent to the Division Head Legal Secretary 10 or Executive Secretary E10.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Ability to operate computer equipment (Microsoft Word, Excel and Access, etc.) in an efficient and effective manner.
- Ability to communicate information clearly and accurately either orally or in written correspondence on supervisor's behalf.
- Knowledge of DIFS operations, objectives and the legislative process.
- Ability to work well with others.
- Employee functions with a high degree of independence and must be able to exercise considerable tact and diplomacy when dealing with others, including industry executives and their legal counsel.

CERTIFICATES, LICENSES, REGISTRATIONS:

None.

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

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

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

n/a

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

ERMELINDA GARZA

Appointing Authority

7/27/2026

Date

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.

Employee

Date