

PART I	DEPARTMENT OF PERSONNEL SERVICES	1.147
	STATE OF HAWAII	1.149
		1.150
.		1.151

Class Specifications
for the

SECRETARY SERIES

This series includes all classes of positions which involve the performance of secretarial services as a primary work assignment along with minor administrative, clerical and related services for a program manager, or administrator of a substantial organizational entity who is not necessarily a program manager. A Secretary serves as a trusted personal assistant which requires: (1) a close and confidential relationship with the manager or administrator served; (2) an overall awareness of the activities and administrative framework of the organization; and (3) the performance of a variety of clerical and minor administrative duties which are auxiliary to the work of the manager or administrator served.

The program manager served is at a level in the State's hierarchy which requires that he or she be substantially involved in planning, programming and budgeting, in addition to work direction and coordination as well as appropriate liaison and public relations. State government operations have been categorized into broad principal program areas such as Formal Education, Social Problems, Health and Transportation, and these are subdivided into more narrow and specific areas in a complex hierarchy of levels. Program planning and budgeting originate at the lowest level subprogram which usually consists of activities with a common purpose wholly administered by a single identifiable organizational unit. An administrator of a substantial organizational entity who is not a program manager is a high level supervisor with considerable responsibility and complexity in work planning, direction, coordination and control.

While individual class concepts only specify program manager, a work setting relevant to an administrator may also be evaluated in terms of the basic criteria established and with reference to comparable situations.

A Secretary speaks and acts for the manager or administrator served in those matters delegated in order to facilitate work flow, coordination and management controls, and relationships with others both within and outside the organization based on a knowledge of the attitudes, views, policies and style of operation of the individual served. Duties performed invariably

include telephone and receptionist duties; keeping a calendar for the manager/administrator, and scheduling appointments and conferences; performing liaison duties between the manager/administrator and his/her other subordinates, and other offices; receiving and distributing incoming mail and preparing replies; arranging for and recording the proceedings of conferences; channeling and reviewing outgoing mail; maintaining records and files; making travel arrangements for the manager/administrator and other staff; and performing various minor administrative and clerical duties related to the operation of the office of the manager/administrator. The performance of stenographic and typing services for the manager/administrator is typical of a Secretary, but their absence does not exclude a position from this series provided that the position has the primary characteristic of being a trusted personal assistant performing duties auxiliary to the work of the manager or administrator served. Supervision of others is normally included but does not typically involve a major portion of the working time.

A Secretary serves as an extension of the manager/administrator in carrying out his/her intent and must be able to act for the manager/administrator in those areas delegated. Levels in this series are therefore distinguished on the basis of two major factors:

1. The scope and level of responsibility and authority of the manager/administrator, and the level of complexity of the work for which the manager/administrator is accountable. Included in this factor are the nature and complexity of the work for which the manager/administrator is responsible, the nature of personal contacts and the size and complexity of the organization. These have a direct relationship on the potential character and scope of the Secretary's duties, the degree of complexity of the overall function in which the Secretary participates, the amount of knowledge of procedures, rules, regulations, policies and programs which is required, and the amount of guidance which is available.

As an extension of the manager/administrator, a Secretary performs work, the potential scope and complexity of which are directly related to the scope and complexity of the work of the supervisor. While reference is made at the higher levels in this series

to the manager's responsibility pertaining to a statewide program or programs, this does not preclude allocation to such levels of secretaries to those managers with comparable scope and level of responsibility, authority and complexity whose program or programs may not be statewide. Moreover, while these standards are primarily directed toward line operations they are also applicable to staff operations in consideration of the scope and level of responsibility, authority and complexity of work of the staff officer served. Typically, however, a departmental staff officer does not warrant a high level Secretary or a level of Secretary comparable to that of a similar-sized line operation, by virtue of the difference in independent authority, external interaction, and direct community consequences.

2. The overall level of responsibility of the Secretary reflected in the duties performed in serving as a trusted personal assistant to the supervisor. The potential scope and complexity of the work of a Secretary, and the potential demands for different and higher judgments, knowledge and skills, increase proportionately with successively higher levels of management or administration. However, the reality of the situation rather than its potential is the ultimate consideration and must be analyzed in terms of the actual delegation of authority, the performance of pertinent duties, and the roles of others who assist the manager/administrator. In other words, while the work of a manager or administrator indicate the potential level of the Secretary, the Secretary may function substantially below that level due to the assignment of lesser duties and responsibilities on the basis of management determination.

Other more specific classification factors are inherent in this general factor of overall level of responsibility. They include the nature of supervision exercised over the work, nature of available guidelines for performance of work, purpose and nature of person-to-person work contacts, nature and extent of supervisory control exercised over the work of other employees, effect and consequence of recommendations and decisions affecting work operations and methods,

judgment and resourcefulness, pressure of work, knowledges and abilities required, and such other responsibilities as the responsibility for confidential matters, and the responsibility for the custody of usually modest sums of money or to initiate or approve its release or expenditure. The factors are interrelated and care must be exercised in the analysis and evaluation of the work.

As in other related clerical series of classes, positions which perform a mixed level of duties will normally be evaluated on the basis of the highest level of work performed a substantial amount of time under general supervision and is significant for recruitment purposes.

This is an amendment to the classification specifications for the Secretary series approved on February 12, 1975. Based on the 1980 State Legislature approval via HCR No. 65 of the Report of the Public Employees Compensation Appeals Board dated January 7, 1980, the titles for the classes Secretary III, 1.149, Secretary IV, 1.150 and Secretary V, 1.151 are changed to Secretary II, Secretary III and Secretary IV, respectively; and the class Secretary II, 1.148 is deleted by merger with the newly-titled Secretary II, 1.149. The foregoing actions are effective August 1, 1980.

DATE APPROVED: 7/28/80 /s/ Wayne Yamasaki
for DONALD BETELHO
Director of Personnel Services

SECRETARY I

1.147

Duties Summary:

Serves as Secretary to the manager of a program and organization of modest complexity; may supervise and participate in performing complex clerical work; and performs other duties as required.

Distinguishing Characteristics:

A position in this class services a manager whose administrative and management functions are modest in complexity due to the limited scope and intricacy of the program and organization. The program is typically more coordinative in nature or a principal but not major sub-program of a larger statewide program.

Assigned work is performed independently, and an employee typically plans and arranges his or her own work schedule but normally carries out the work in accordance with established procedures and standard practices. A position in this class may work regularly with information which is of a restricted nature. There is regular contact with other programs in a department, the general public, and others in obtaining or furnishing information or reports, which require tact to avoid misunderstanding.

A position in this class may include the taking and transcribing of shorthand dictation and/or the performance of skilled typing.

Examples of Duties:

Receives and routes calls and callers to person requested, or routing is obvious; answers questions and gives requested direction or other standard information orally; reads incoming correspondence, and refers to supervisor unless specifically or obviously intended for someone else in the office; composes routine non-technical correspondence or memoranda, following standard operating procedures; checks standard forms and/or outgoing correspondence for inaccuracies of spelling, punctuation, grammar, spacing, neatness or general appearance; notifies or reminds certain individuals or offices of meetings, scheduled dates or specific duties or occurrences; arranges interviews, appointments or other meetings, by consulting a list, time schedule, or other record, or by contacting, directly or indirectly, any or all of the persons concerned; arranges for reservations, purchase of airline tickets, equipment maintenance, telephone service, or other similar matters; receives orders, requests, instructions or information, personally or by telephone, and makes follow-up with other government or private agencies on requests for information, etc.; anticipates needs of supervisor or others serviced and gathers records, letters or

other specific items of information that might be wanted; selects and/or gathers specific data, information, or desired items, according to standard operating procedures, or upon request; determines need for and/or makes routine orders for necessary supplies, materials, or other items; checks numerical or verbal data on forms, records or other items against a master form, or other standard, for inconsistencies, errors, or omissions; sets-up files and/or codes, indexes, tabs or otherwise prepares classified material for filing or identification using standard or accepted systems; may typewrite straight copy from correct copy or rough drafts; prepares duplicating machine stencils and/or master copies; makes up individual copies of correspondence, reports, or other numerical or verbal data, by longhand or using an automatic typewriter; may take dictation using shorthand or a steno-type machine and transcribe using a typewriter; takes general notes and/or minutes at meetings or conferences by longhand, shorthand or steno-type machine; makes out various routine forms such as checks, receipts, invoices, form letter addresses, or other items, according to standard operating procedures by longhand, using a typewriter or other type of office machine; may punch and record desired numerical and/or verbal data on proper forms or cards, using an alphanumeric type key punch machine or an alphabetical printing-punch machine; prepares consolidated worksheets and summary totals; prepares routine reports comprised mainly of numerical data based on information at hand following standard operating procedures; may check and verify the accuracy of data punched on tabulating cards using a checking machine or a keyboard-type verifying machine; keeps a running balance of specific items, entries or amounts, with or without using a machine; checks actual quantity, quality, condition, value, or type of item against a master form or standard, verifying the accuracy of the forms and/or correctness of the item; balances specific items, entries, or amounts periodically in accordance with established groupings and categories, with or without using a machine; searches indexes, manuals, files, records or other sources for desired or missing information on specific subjects; classifies informational material, correspondence, special forms, records, orders, merchandise, or other items, following standard or accepted methods of systematized arrangement; corrects or marks errors found in figures, calculations, or record book data, by hand or using some type of office machine; may make up tables, graphs, charts or diagrams, based on data supplied from other sources using drawing, lettering or other instruments; compiles numerical or statistical data for tables, charts, rate schedules, or other

uses with or without using a machine; makes out routine schedules of work, production, appointments, arrivals, departures or other matters; traces or follows-up on various forms, records, orders, materials or other items; obtains necessary or desired information, authorizations, approvals, signatures or other data from clients, applicants, superiors or other individuals; checks items to make certain that correct procedures are followed; may supervise clerical subordinates and others in the performance of complex clerical work (as defined in the Clerk series) on a regular and continuing basis.

Knowledge and Abilities Required:

Knowledge of: Business English; spelling; arithmetic; the operation and operational maintenance of common office appliances and equipment including office duplicating and copying machines; office practices and procedures.

Ability to: Carry out various routine secretarial functions; carry out a variety of standard office clerical routines; perform clerical assignments requiring uniform mental attention; learn and apply pertinent statutory provisions, rules, regulations, policies and procedures; learn and apply a variety of instructions furnished in written, oral, diagrammatic or schedule form; operate and maintain various common office appliances, which may include duplicating and simple electronic data processing equipment; prepare simple narrative and numerical reports; perform arithmetic operations quickly and accurately; speak and write simply and directly, and deal tactfully with others; for some positions, type accurately at an acceptable rate of speed, or type and take and transcribe shorthand dictation at acceptable rates of speed; for some positions, operate an automobile, and/or supervise the work of others.

SECRETARY II

1.149

Duties Summary:

Serves as Secretary to the manager of a program and an organization of considerable scope and complexity; may supervise and participate in performing highly complex clerical work; and performs other duties as required.

Distinguishing Characteristics:

A position in this class services a manager whose administrative and management functions are complex due to the considerable scope and intricacy of the program and organization. The program is typically authoritative but more coordinative in nature, or a major subprogram of a larger statewide program. The manager may direct a staff through subordinate supervisors.

At this level, the Secretary is required to have a knowledge of the substantive work of the organization in order to speak or act for her supervisor in those matters delegated to her. Therefore, although a position in this class performs the routines in connection with the management of the office in accordance with established procedures and instructions, decisions are frequently required. However, the supervisor or possibly another advisor is usually available for consultation when any unusual problems arise.

A position in this class may include the taking and transcribing of shorthand dictation and/or the performance of skilled typing.

Examples of Duties:

Greets visitors to the office and answers the telephone; refers calls and callers to supervisor and other staff based on knowledge of the work of the organization; takes messages for the supervisor; makes appointments for the supervisor and reminds the supervisor of appointments; gives direct factual information in response to specific inquiry when there is no question as to the propriety of releasing such information; receives and opens incoming mail, and refers to the supervisor unless referral can be made to another staff member; attaches previous correspondence and other related matters to correspondence requiring supervisor's attention; sends routine acknowledgments or selects form letters in response to routine inquiries; composes routine correspondence for supervisor's review, requiring specific knowledge of operational methods, procedures, policies, or other information; reviews all outgoing correspondence for typographical accuracy, and conformance with procedures; establishes and maintains subject matter, alphabetic and/or chronological files, and supplies records upon request or in anticipation of supervisor's need; procures supplies, equipment, repair and maintenance services and the like, through agency

channels; consults or studies specific books, manuals, catalogs, or other sources in order to obtain desired information; makes assignments of facilities, vehicles, equipment or similar items to provide for efficient and optimal use; orally relays messages and instructions to other subordinates of the supervisor; allocates debits, credits, costs, charges or other similar bookkeeping items of operational procedures to correct accounts or classifications; may typewrite straight copy from correct copy or rough drafts; prepares duplicating machine stencils and/or master copies; may take dictation using shorthand or a steno-type machine, and transcribe using a typewriter; takes general notes and/or minutes at meetings or conferences by longhand, shorthand or steno-type machine; explains details of services, methods or policies; reviews the work of others, calling attention to the use of incorrect procedures or methods and to correct entries or results; approves or recommends rejection of applications, requests, claims or other items following operational policies or rules of action; may supervise clerical subordinates and others in the performance of highly complex clerical work (as defined in the Clerk series) on a regular and continuing basis.

Knowledge and Abilities Required:

Knowledge of: Business English; spelling; arithmetic; the operation and operational maintenance of various office appliances and equipment, including office duplicating and copying machines; office practices and procedures.

Ability to: Carry out a varied range of secretarial and clerical functions; organize, assign, direct and review the work of others; maintain an effective work pace under periodic deadlines; learn and apply pertinent statutory provisions, rules, regulations, policies and procedures; read and understand manuals and other detailed books of instruction; write routine business letters, summaries and reports using acceptable format and conforming to all rules of grammar and style; speak simply and directly, including occasionally speaking to groups as well as individuals; deal tactfully with others both within and outside the organization; for some positions, type accurately at an acceptable rate of speed, or type and take and transcribe shorthand dictation at acceptable rates of speed; for some positions, operate an automobile and/or supervise the work of others.

SECRETARY III

1.150

Duties Summary:

Serves as Secretary to the manager of a statewide program or programs and an organization of substantial complexity and size or scope; and performs other duties as required.

Distinguishing Characteristics:

A position in this class services a manager whose administrative and management functions are substantial due to the rather large size and particular configuration of the organization and the varied nature and scope of the program or programs.

Subordinate staff is normally divided into specialized and distinct segments, which may in turn be further subdivided, so that direction and control is exercised through other levels of supervision.

The work setting is further characterized by the following:

1. A formalized system of internal procedures and administrative controls which may be quite extensive.
2. Necessity for coordination among the program and organizational components resulting in formalized procedures due to the difficulty of coordination.
3. A large number of contacts with persons both within and outside the department due to public interest and participation in the program.
4. Frequent and critical deadlines which must be met, and while crises arise from time to time, the types of situations handled are mainly those which, while important, are handled in accordance with established policies and procedures.
5. Periodic and normal organizational and personnel changes and realignments.

A position in this class proceeds independently with all aspects of the work subject to limited direction of the supervisor.

Examples of Duties:

Receives telephone and personal callers and incoming mail, screens and refers those which can be handled by other subordinates and takes care of routine matters, orally or by correspondence, such as requests for instructions concerning the correct procedure in filing applications or securing consideration of special cases which do not involve controversial questions; reviews all outgoing correspondence submitted to the supervisor for signature, for clarity of format, typographical accuracy, conformance with procedural instructions, to determine that all necessary background material is attached to the file, etc.; maintains the supervisor's calendar, reminds supervisor of appointments and makes appointments based on standing instructions; maintains records of incoming and outgoing correspondence and action documents, and follows up on work in process in accordance with a regular schedule; reviews publications such as journals, and newspapers, for articles or other information dealing with subject matter of special interest for the attention of the supervisor; establishes and maintains subject matter files in connection with the supervisor's work, and exercises initiative in establishing or revising files to meet current needs and demands for the material; makes travel arrangements for the supervisor and the supervisor's other subordinates; and maintains records of their itineraries while they are on travel status; attends to the procurement of supplies, equipment, printing, maintenance services, etc., to see that the supervisor's immediate office is adequately provided for in these areas; obtains documents, files and background information for the supervisor on the basis of general instructions as to the nature of the subject matter; may operate a typewriter to type correspondence, reports and other materials; may take and transcribe dictation of correspondence, reports and other materials.

Knowledge and Abilities Required:

Knowledge of: Business English; spelling; arithmetic; general and special office practices and procedures as they relate to operations; the operation and operational maintenance

of various office appliances and equipment; and principles and practices of secretarial work.

Ability to: Plan, organize and carry out a broad range of secretarial and clerical functions; organize, assign, direct and review the work of others; learn and apply knowledge of the organization, procedures and key personnel; write varied business letters, summaries and reports requiring judgment as to appropriate format and conforming to all rules of grammar and style; speak simply and directly to individuals and groups in conveying limited information about some technical aspects of programs as well as all aspects of routine procedures; maintain confidential files and records relative to employee-employer relations and other matters; deal tactfully with others, both within and outside the organization in carrying out the instructions and policies of the supervisor; for some positions type accurately at an acceptable rate of speed, or type and take and transcribe dictation at acceptable rates of speed; for some positions, operate an automobile.

SECRETARY IV

1.151

Duties Summary:

Serves as Secretary to the manager of statewide programs and an organization of extensive complexity and size or scope; and performs other duties as required.

Distinguishing Characteristics:

A position in this class services a manager whose administrative and management functions are extensive due to the large size and particular configuration of the organization, and the varied nature and scope of the programs. The organization consists of several subordinate echelons and involves an extensive formalized system of internal procedures and administrative controls, and may include various staff specialists in such fields as personnel, management analysis, systems and cost accounting, etc. In addition, the organization is characterized by conditions which increase the level of complexity, importance and intensity of the personal contact work of the manager, such as:

1. The office is frequently faced with meeting rigid deadlines which are the center of widespread interest and which have serious consequences within the department and the State government, and throughout the State at large.
2. There is active and extensive public interest or participation in the programs which results in the manager spending a substantial portion of his time in personal contacts with citizen groups, legislative groups, professional societies, educational groups and officials of other levels of government.
3. The programs are interlocked on a direct and continuing basis with the programs of other departments, agencies or organizations, requiring constant attention to formal clearances and procedural control.
4. The programs are directly affected by conditions outside the organization which vary widely in nature and intensity, and which frequently require organizational, procedural, or basic program adjustments.

A position in this class participates intensively in the management of the office by applying a good working knowledge of the programs in order to contribute to the solution of procedural and management problems which arise.

Examples of Duties:

Receives telephone and personal callers, screens those which can be handled by other subordinates of the supervisor or other offices, and tactfully makes referrals as appropriate; personally takes care of many matters and questions from callers including answering substantive questions not requiring professional research or detailed technical knowledge; keeps the supervisor's calendar and schedules appointments and conferences without prior clearance, seeing that the supervisor is fully briefed on the matters to be considered before scheduled meetings; receives requests for statistical or informative material concerning the programs which can be assembled from the files and records, advises when the material can be furnished, and prepares it personally or follows up to see that it is prepared within the

specified time by the supervisor's staff; makes necessary arrangements for conferences including space, time, people, etc., assembles background for the supervisor, attends meetings and prepares reports of the proceedings; receives and reads incoming correspondence, reports, instructions, etc., and screens out those that can be personally handled by drafting replies to general inquiries not requiring a detailed technical knowledge of the programs, relaying instructions to subordinate office, collecting data, preparing reports for higher echelons or otherwise acting on requests concerning procedural or administrative requirements; maintains control records on incoming correspondence and action documents and follows up on work in process to insure timely reply or action; reads outgoing correspondence for procedural and grammatical accuracy, conformance with general policy, factual correctness and adequacy of treatment, and calls any deviations or inadequacies to the attention of the writer or more rarely to the supervisor; assists the supervisor's other subordinates in the procedural aspects of expediting the work of the office, including such matters as shifting clerical help in subordinate offices to take care of fluctuating workload, explaining and guiding implementation of the supervisor's instructions concerning procedures, explaining report requirements and arranging with professional and technical staff for the collection and submission of data for assembly into general reports of the total work of the office, etc.; informs and instructs officials, technicians and lower-grade clerical personnel in the office concerning established procedures for the preparation and clearance of correspondence, action documents and the like; informs the supervisor on such matters as procedures in the clearance of memoranda, past practices with respect to various reports, the general nature and history of miscellaneous recurring items, and the sources from whom the supervisor can obtain a quick explanation of various matters; may operate a typewriter to type correspondence, reports or other materials; and may take and transcribe dictation of correspondence, reports and other materials.

Knowledge and Abilities Required:

Knowledge of: Business English; spelling; arithmetic; general and special office practices and procedures as they relate to operations; the operation and operational maintenance of various office appliances and equipment; secretarial principles and practices; report writing.

Ability to: Plan, organize and carry out a broad range of secretarial functions; organize, assign, direct and review the work of others; write varied and complex business letters, summaries and reports requiring judgment as to appropriate format and conforming to all the rules of grammar and style; speak simply and directly to individuals and groups in conveying information about various technical aspects of programs and the supervisor's point of view; maintains or directs the maintenance of confidential files and records, including those relating to employee-employer relations; deal tactfully with others, both within and outside the organization in carrying out the instructions and policies of the supervisor; apply a good working knowledge of the substance of the programs to aid in the solution of procedural administrative problems which may arise; for some positions, type accurately at an acceptable rate of speed, or type and take and transcribe dictation at acceptable rates of speed; for some positions, operate an automobile.