

## **EXECUTIVE ASSISTANT**

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

### **DEFINITION**

Under General Manager/CEO direction, performs highly responsible, confidential and complex work for the General Manager/CEO and the Board of Directors; plans, organizes, coordinates and manages the daily operations of the Offices of the General Manager/CEO and Board of Directors.

### **DISTINGUISHING CHARACTERISTICS**

This position class is distinguished by its responsibility for providing direct executive level support to the General Manager/CEO and/or the Board of Directors and serves as a member of the District's Executive Team and also in the following capacities: Clerk of the Board, Custodian of Records, FPPC Compliance/Filing Officer, Elections Officer, and Recording Secretary for the District Financing Authority, Public Facilities Corporation, Frontier Project Foundation and Fontana Union Water Company Boards. The incumbent is expected to demonstrate a high level of expertise and initiative with complex, responsible, and confidential support work requiring the use of independent judgement and consultation with District legal counsel.

### **SUPERVISION RECEIVED AND EXERCISED**

Direct supervision is received from the General Manager/Chief Executive Officer.

Direct supervision or technical/functional work direction may be provided to other administrative staff.

**May exercise supervision or technical/functional work direction to other general administrative staff.**

### **ESSENTIAL AND MARGINAL FUNCTION STATEMENTS**

*Essential and other important responsibilities and duties may include, but are not limited to, the following:*

#### **Essential Functions:**

1. Plans, organizes, and integrates the work of the Office of the General Manager/CEO and Board of Directors; performs advanced duties for the General Manager/CEO and Board of Directors. Serves as liaison for the Offices of the General Manager/CEO and Board of Directors, and responds to various requests for information from the public.
2. As Clerk of the Board, manages the preparation, production and distribution of the Board and committee agenda packet materials including required Board memoranda and resolutions, and ensures their posting and public notification in compliance with legal requirements and the Brown Act. Attends all Board meetings; oversees and coordinates meeting logistics and conduct of closed sessions; ensures all actions and votes are properly executed, recorded and archived; drafts the official meeting minutes and prepares summaries of Board meetings and other District meetings; drafts and arranges for publication of legal notices, postings and public hearings; assists departments in formatting of resolutions and ordinances.
3. As Custodian of Records, serves as the liaison between the public and the District in responding to all Public Records Act requests; arranges the preparation of official records and archives of the District

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including ordinances, resolutions, minutes, and historical documents; prepares and maintains District retention schedule; manages annual destruction of records; implements document preservation, retention, and destruction policies in consultation with District departmental representatives. Determines the applicability of Public Records Act provisions to various District records; upon request or subpoena, furnishes copies of resolution, minutes and other official records, certified and sealed as to their validity.

4. Updates and prepares the biennial filing of the Conflict of Interest Code with the County to ensure District compliance.
5. As FPPC Filing/Compliance Officer, analyzes and ensures compliance with local, state, and federal laws pertaining to statements of economic interest, Board member elections and campaign financing, and advises the Board and General Manager regarding the requirements of such legislation; notifies affected parties of Fair Political Practices Commission (FPPC) requirements and deadlines; ensures filing deadlines are met and answers questions regarding filing issues from the Board, the employees identified on the District Conflict of Interest Code, District candidates, and the public.
6. As Elections Officer, coordinates the process for Board elections; ensures all related processes, including verifying candidate eligibility, are in compliance with state and local election laws; submits candidate applications to the County Registrar of Voters; administers oaths of office to elected officials; coordinates the orientation of newly elected board members with executive management.
7. As Recording Secretary of the District's foundation and additional Boards, manages the preparation, production and distribution of the agenda packet materials including required Board memoranda and resolutions, and ensures their posting and public notification in compliance with legal requirements and the Brown Act; attends meetings and ensures all actions and votes are properly executed, recorded and archived; drafts the official meeting minutes.
8. Coordinates all meeting follow-up activities for the General Manager/CEO and Board members; assists in collecting, compiling, and analyzing information from various sources on a variety of specialized topics related to programs administered by the General Manager/CEO or the Board; researches information using a variety of sources, including historic files and the Internet; compiles data and assists with the preparation of reports that present and interpret data, identify alternatives, and make and justify recommendations.
9. Prepares and distributes weekly confidential correspondence to the Board of Directors and executive management to ensure open communication of District operations and incidents in a timely manner.
10. Develops and implements office-related goals, objectives, policies, and procedures; analyzes and interprets complex documents and administrative procedures and regulations. Composes staff reports and resolutions; performs amendments to Administrative Policies in compliance with local, state, and federal regulations, and updates the District Code in accordance with such amendments; provides presentations at committee and Board meetings on such information.
11. Prepares, administers, and maintains the annual budget for the Offices of the General Manager/CEO and Board of Directors.
12. Maintains and oversees the General Manager/CEO and Board members' calendars and schedules; coordinates, arranges and confirms meetings; screens requests for appointments and if necessary refers requests to appropriate departments/staff for action. Coordinates all General Manager/CEO and Board member travel for District related business; prepares and processes expense reports for reimbursement.

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13. Maintains web page content for the Board of Directors and General Manager/CEO including agendas, minutes, elections and Board member terms, and other pertinent information.
  
14. Regular attendance as work site.

### **Marginal Functions:**

Provides incidental support to the District's executive management team; performs related duties and responsibilities as required.

May assign, review and oversee the work of other general administrative staff providing general clerical and office support to the Offices of the General Manager/CEO or Board of Directors.

## **KNOWLEDGE, SKILLS AND ABILITIES**

### **Knowledge of:**

District codes, state and local laws, and other legal requirements applicable to the governmental structure of the District and specifically related to the functions and operations of the Board of Directors and the General Manager/CEO.

Legal requirements applicable to the maintenance and retention of public records.

Requirements of the Brown Act and parliamentary procedure.

Organization, functions, procedures and rules of Cucamonga Valley Water District and its Board.

The methods and formats used for preparing complex business correspondence, compiling data and information, and performing data analysis.

The principles of written English including proper grammar, punctuation, spelling and vocabulary.

Methods of researching information.

Advanced methods of classifying, indexing, processing, retrieving, and controlling documents.

Mathematical operations related to administrative processes.

Basic principles of supervision and leadership.

Computer applications and systems related to department functions; maintenance of public records.

### **Skill in:**

Operating a personal computer and standard office equipment.

Driving a motor vehicle in a safe and effective manner.

### **Ability to:**

Understand the mission and functions of the District sufficient to communicate to outside agencies and the general public.

Work independently, using good judgment and initiative in carrying out assignments.

Set goals and priorities and carry out multiple assignments concurrently.

Be flexible and adaptable to change.

Respond in a tactful and professional manner to inquiries from the public.

Maintain confidentiality and use discretion in release of information.

Supervise and/or direct the work of others and evaluate the performance as necessary.

Provide advanced and complex support to an executive manager and elected officials.

Evaluate and establish priorities.

Take complete, comprehensive notes at live meetings, to prepare clear, concise, and complete documentation, minutes and other reports and correspondence.

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Type, at an acceptable rate of speed, a variety of complex documents that may be highly sensitive/confidential, include technical information, and/or require specialized formatting.

Research, interpret, explain and apply complex procedures, rules and regulations.

Gather, organize, input and maintain complex information, including financial or program-specific data.

Analyze data and information at a level sufficient to identify trends and visible findings and draw logical conclusions.

Provide/obtain detailed information to/from others as appropriate, including confidential and/or otherwise sensitive information.

Serve as a liaison between District personnel, other agencies, and the public.

Communicate clearly and concisely, both verbally and in writing.

Establish and maintain effective working relationships with those encountered during the course of the work.

## **REQUIRED QUALIFICATIONS**

### **Experience and Training Guidelines**

*Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

#### **Education:**

Either (1) Possession of an Associate of Arts or Bachelor's degree from an accredited college or university with a major in business management, public administration or a related field or (2) completion of a formal program of instruction in Business Administration or Business Technology from an accredited school, or (3) an equivalent program of academic preparation acceptable to the District, or (4) Possession of a Certified Municipal Clerk designation from the International Institute of Municipal Clerks.

#### **Experience:**

Five years of experience performing highly complex, advanced support to executive level management. At least two years of experience serving in a capacity that supports an elected or non-profit board of directors and/or General Manager/CEO which includes agency agenda materials, preparation and presentation, taking meeting minutes and transcription.

#### **License:**

(1) Possession of a valid Class C California driver's license and a satisfactory driving record at the time of hire. (2) A valid State of California Notary Public License is required, or ability to obtain within six (6) months of appointment.

## **PHYSICAL AND WORKING CONDITIONS**

*The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

### **Environmental**

Normal office environment with exposure to computer screens.

### **Physical**

While performing the duties of this class, employees are regularly required to sit, walk, and stand; talk or hear, in person and by telephone; use hands repetitively to finger, handle, feel or operate standard office equipment; reach with hands and arms. Employees are occasionally required to walk, and stand for prolonged periods; stoop, bend, kneel and twist; and may lift up to 10 pounds.

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### **Mental**

While performing the duties of this class, the employee is regularly required to use written and oral communication skills; read and interpret data, information and documents; analyze and solve problems; observe and interpret situations; learn and apply new information or skills; perform highly detailed work; work on multiple concurrent tasks; work with frequent interruptions; work under intensive deadlines; interact with District managers, staff, vendors, the public and other encountered in the course of work.

### **Vision**

See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents; and operate assigned equipment.

### **Hearing**

Hear in the normal audio range with or without correction.

DATE ADOPTED: October, 2001

DATE MODIFIED: February, 2020

Safety Sensitive Position