

ASSISTANT CLERK OF THE BOARD

This class specification indicates, in general terms, the type and level of work performed as well as the responsibilities of employees in this classification. The job functions described are not to be interpreted as being all-inclusive to any specific employee.

DEFINITION

Under general direction, performs a broad range of professional, confidential, technical, and administrative duties in support of the day-to-day operations of the Board Services Division; assists in the planning and development of all required processes; coordinates and monitors processes related to agendas, minutes, ordinances, resolutions, contracts, agreements, official records, and records management of OC San; develops, implements, and administers OC San's records management program; receives, distributes, and coordinates responses for all requests of public records; ensures compliance with California Public Records Act regulations and timelines; performs work that requires interpretation and analysis of information; provides recommendations on problem resolution; participates in short- and long-range planning; and performs duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the assigned supervisory and/or managerial staff. Exercises technical and functional direction over and provides training to lower-level staff.

CLASS CHARACTERISTICS

This classification is a professional-level class within the General Manager's Office. Positions participate in optimizing assigned processes and/or operating policies and procedures, serve as a lead in developing new processes in response to new or changing regulations, and serve as project or team leader in area(s) of expertise. Positions require the use of considerable discretion, a broad understanding of OC San functions and records management best practices, and the ability to relieve the Clerk of the Board of day-to-day office administrative and coordination of duties in the office and at Board of Directors and committee meetings, as well as fulfilling some of the duties of the Clerk of the Board in their absence. Assignments are given with general guidelines, and positions are responsible for establishing objectives, timelines, and methods to deliver work products or services. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

The following essential job functions are typical for this classification. Incumbents may not perform all of the listed job functions and/or may be required to perform additional or different job functions from those set forth below to address business needs and changing business practices.

- Assists in coordinating the preparation of Board of Directors regular and committee meeting agendas and related documents in accordance with legal requirements; performs administrative duties and follows through on directives of the Board of Directors and management staff in accordance with established OC San policies and procedures and applicable statutes; interacts with various departments for supporting documentation; publishes official notices and documents as required.

- Coordinates, prepares, and reviews documents to be placed on Board of Directors and standing committee agendas; ensures documents are complete, accurate, and compliant in content and format, including required attachments and/or exhibits; provides guidance to staff members on agenda report content and formatting.
- Manages day-to-day operations of OC San's electronic agenda management, disclosure, and recording systems, secure virtual data platform, and related technical programs.
- Attends Board of Directors' regular and committee meetings; takes and prepares minutes; provides general administrative support, including preparing confidential and highly sensitive documents.
- Responsible for receipt, distribution, coordination, and monitoring of responses to requests for public records; justifies nondisclosure and/or ensures deletion of any portions exempt from Public Records Act mandates; provides assistance to the public by helping to identify records and information relevant to the request; ensures timely response to requests and communicates in writing with any requestor in cases of unusual requests that may cause delays in obtaining the requested information.
- Researches, interprets, explains, and ensures compliance with the California Public Records Act, the Freedom of Information Act, Proposition 218 the "Right to Vote on Taxes Act", Political Reform Act, and the Brown Act and operating policies and procedures; communicates business implications and impact to the Clerk of the Board.
- Develops, implements, and administers OC San's records management program for official records and archives in accordance with legal requirements and records management policies and procedures adopted by the Board of Directors; researches and participates in the development and implementation of records management retention schedules, policies, and procedures.
- Coordinates with OC San departments and divisions to identify, classify, manage, and control records; coordinates disposition and storage of records including archives and historical documentation protection, preservation, and destruction; determines types and timing of records audits; manages offsite storage vendor account, including record retrieval and destruction.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of legislative processes and records and information management; researches emerging products and enhancements and their applicability to OC San's needs.
- Assists in coordinating compliance with legal requirements related to Board activities, including conflict of interest filing, filings for assuming office, leaving office, and annual documentation, and notification, acceptance, recording, storage, and retrieval of official documents regarding Fair Political Practices Commission – Statement of Economic Interest.
- Ensures the execution of confidential and complex administrative, technical, and programmatic duties; performs professional-level duties in conducting a variety of studies, analysis, and research; collects, compiles, and reviews information from various sources on specialized topics related to assigned programs; develops summary reports presenting the data, identifies alternatives, and makes and justifies recommendations; assists in implementing recommendations and evaluates implementation of changes.
- Develops, implements, and provides departmental and organization-wide training sessions on board services and records management related topics, policies, and procedures.
- Assists in short- and long-term program planning and development for assigned programs; provides staff assistance in the development and implementation of goals, objectives, and various administrative policies, procedures, rules, and regulations in accordance with sound organizational practices; researches and monitors federal, state, and local legislative activities, changing business practices, and new trends and innovations; may provide related recommendations to the supervisor as needed.
- Assists with the budget process by collecting and analyzing the division's financial data; creates data tracking and reporting systems for monthly monitoring.
- Provides functional leadership and guidance to others on programs and/or projects; as a program and/or project leader, directs, assigns, trains, monitors, and reviews the work activities of team members; assists in determining work priorities and assignments; trains assigned employees in their area of work; ensures adherence to established policies and procedures; serves as a resource for employees by possessing specialized skills pertaining to Clerk of the Board programs and functions; recommends and works with supervisor to implement work improvements.

- Ensures safety and health procedures and precautions are adhered to, corrects unsafe work conditions/practices, and/or reports unsafe work conditions/practices to assigned supervisory or managerial staff.
- Performs duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of confidential and complex administrative, technical, and programmatic duties related to Board of Directors meetings and activities; preparation and distribution of minutes of meetings; processing and recording of actions and documents approved by the Board.
- Principles and practices of public sector board functions, including agenda preparation, minute-taking and preparation, and associated posting requirements related to California open-meetings law.
- Principles, practices, and methods of a modern records and information management program, including procedures used in implementing legal guidelines, regulations, laws, and procedures governing the confidentiality, security, and administration of records and information.
- Methods and techniques of data collection, research, and preparing reports.
- Methods and techniques of statistical and financial analysis.
- Methods, techniques, and principles used in the preservation and maintenance of various materials.
- Principles of business letter writing.
- Principles of providing functional direction and training.
- Principles and applications of critical thinking and analysis.
- Applicable federal, state, and local laws, codes, and ordinances relevant to area(s) of responsibility.
- Techniques for effectively representing OC San in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Current equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Develop and/or oversee activities related to board services and records management programs.
- Plan, organize, and coordinate the work of assigned staff.
- Effectively provide staff leadership and work direction.
- Demonstrate strong program/project management skills.
- Resolve conflict through workable solutions and alternative approaches.
- Inspect the work of others and maintain established quality control standards.
- Prepare complete and concise agenda packages for the Board of Directors and the general public; attend meetings; and take and transcribe accurate minutes.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
- Apply critical thinking and analysis to a broad range of situations and in making independent decisions.
- Maintain confidentiality in maintaining critical and sensitive information, records, and reports.
- Respond tactfully, clearly, and appropriately to requests and inquiries from the public.
- Independently prepare clear and concise analytical, administrative, and financial reports, correspondence, policies, procedures, and other written materials.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.

- Effectively represent the department and OC San in meetings with governmental agencies, contractors, vendors, and various businesses, professional, regulatory, and legislative organizations.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Use tact, initiative, prudence, and independent judgment within general legal, policy, and procedural guidelines.
- Comply with safe work practices and procedures in the workplace.
- Provide a high level of customer service by effectively dealing with the public, vendors, contractors, and OC San staff.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Employment Standards:

Any combination of education and experience that provides the required knowledge, skills, and abilities may be qualifying as determined by OC San.

1. Bachelor's degree from a college or university accredited by the U.S. Department of Education, with major coursework in public or business administration or a related field.
2. Five (5) years of increasingly responsible experience managing a range of technical programmatic or administrative areas supporting a Board of Directors, a City Council, and/or department head, or experience in a similar public agency environment including administering a records management program.

Licenses and/or Certifications:

- Must possess or obtain a valid Certified Municipal Clerk (CMC) certification within 12 months of placement in position.
- Must possess or obtain a valid Notary Public Commission in the State of California within 12 months of placement in position.

Disaster Service Workers:

All Orange County Sanitation District employees are designated Disaster Service Workers through state law (California Government Code Section 3100-3109). Employment with the Orange County Sanitation District requires the affirmation of a loyalty oath to this effect. Employees are required to complete all related training as assigned, and to return to work as ordered in the event of an emergency.

PHYSICAL DEMANDS

- Mobility to work in a standard office setting and use standard office equipment, including a computer; this is primarily a sedentary office classification although standing in work areas and walking between work areas may be required; occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information; ability to lift, carry, push, and pull materials and objects up to 35 pounds.
- Vision to read printed materials and a computer screen.
- Hearing and speech to communicate in person and over the telephone.
- Finger dexterity to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment.

ENVIRONMENTAL ELEMENTS

- Office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.
- Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

OTHER REQUIREMENTS

- May be required to work extended hours, including nights, weekends, and holidays when necessary.
- Probationary Period: All OC San employees, except classifications considered “at-will”, are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, policies, and/or resolutions. Employees who have not yet successfully completed their initial probationary period serve “at-will” and may be released from employment without cause or recourse to any appeal or grievance procedures.
- Pre-Employment: All employment offers are contingent upon successful completion of OC San’s pre-employment process, which includes a background investigation, a physical examination, and a drug screen.
- Work Location Assignment: Employees will be assigned to a work location based on business needs which may be located at any/all of OC San locations; this work location may be changed at any time.