

SECRETARY SERIES

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- Secretary GS-3/11
- Secretary (Stenography) GS-3/11
- Secretary (Typing) GS-3/11
- Secretary (Dictating Machine Transcribing) GS-3/11

Description of work

A secretary is the principal personal office assistant to a designated supervisor and has a close and direct working relationship with him. The secretary is normally accorded confidence in all matters relating to the program and organization within the supervisor's jurisdiction, and the work is closely identified with the superior's viewpoint and responsibilities. Duties are immediately auxiliary to the work of the superior and are part of a broader and more inclusive responsibility which the secretary has for participating in his work by relieving him of details of administration.

A secretary performs or supervises the performance of a variety of tasks, including performing telephone and receptionist duties; keeping the supervisor's calendar and scheduling his appointments and conferences; performing liaison duties as necessary between the supervisor and his other subordinates, and other offices; receiving and distributing incoming mail and preparing replies; arranging for recording of proceedings of conferences; channeling and reviewing outgoing mail; maintaining records and files; making travel arrangements for the supervisor and his staff; assembling and disseminating information; transmitting staff instructions; performing miscellaneous clerical duties related to the management of the supervisor's office; and often performing stenographic and typing services for the supervisor.

The grade levels of secretarial positions vary with the scope of the supervisor's administrative responsibility, with the extent of the secretary's participation in the work of the supervisor, and with the knowledges, skills, and abilities required.

Secretarial positions may or may not require stenographic, typing, or dictating machine transcribing skills.

Basic requirements

Experience required.—Except for the substitution provided for below, competitors must

show progressively responsible experience of the kind and in the amounts indicated in the following table:

Grade	General experience (years)	Specialized experience (years)	Total experience (years)
GS-3.....	1	0	1
GS-4.....	2	0	2
GS-5.....	2½	½	3
GS-6.....	2½	1	3½
GS-7.....	2½	1½	4
GS-8.....	2½	2	4½
GS-9.....	2½	2½	5
GS-10.....	2½	3	5½
GS-11.....	2½	3½	6

General experience

Experience in typing, stenographic, or general clerical work, or any combination of these. For GS-4 and above at least 6 months of this experience must have consisted of (or included *in addition* to typing, stenography, or routine clerical work) work which demonstrated possession of ability to perform secretarial work above the trainee level; for example, *several* such duties as the following: answering telephone calls; receiving visitors; composing correspondence; obtaining and presenting information; routing incoming correspondence on the basis of subject matter; reviewing outgoing correspondence for grammar, spelling, typography, and format; *or* serving as a personal clerical assistant or aide to a professional, technical, supervisory, administrative, executive, or similar employer.

Specialized experience

Experience in secretarial work which has involved responsibility for serving as the principal personal office assistant to a designated supervisor, and which has included participation in the work of the supervisor through a close and direct working relationship and has involved most or all of the kinds of duties described above under the heading "Description of Work."

Quality of experience

Length of experience in itself will not necessarily be considered qualifying. The applicant's record must show experience of such quality and kind as to demonstrate successful application of progressively broader knowl-

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edges, greater judgment; and higher skills commensurate with the level of position for which the candidate is being considered.

In addition to or included in the total experience, applicants for positions at grades GS-6 through GS-11 must show either 6 months of specialized experience comparable in responsibility and difficulty to that of the next lower grade level, or 1 year of such experience comparable to the second lower grade level in the Federal service.

Secretarial proficiency

In addition to meeting the experience and educational requirements described below, all competitors must be proficient in the application of knowledges and the utilization of skills which are important in secretarial work, including knowledge of the organization, ability to handle a variety of duties, and capacity for keeping her supervisor up to date on developments and appointments. In addition, applicants for those secretarial positions which require typing and/or stenography must be proficient in these skills.

Personal traits and characteristics.—In addition, all competitors must demonstrate possession of certain traits essential to the performance of secretarial duties. These are: (a) effectiveness in getting along with others; (b) ability to work independently; (c) loyalty, integrity, discretion; (d) capacity and willingness to accept responsibility; (e) judgment, initiative, resourcefulness; and (f) poise, personal dignity, neatness, and good grooming.

Substitutions

Except for any requirement for passing performance tests to demonstrate skill in shorthand and/or typing (as required):

- (a) All of the experience requirements for the GS-5 level may be met by completion of 4 academic years of education in a residence college.
- (b) All of the experience requirements for the GS-4 level may be met by (1) completion of 2 academic years of full-time business school or 2 academic years of education above the high-school level; or

(2) qualifying for Clerk-Typist GS-4, Clerk-Stenographer GS-4 (including the demonstration of required typing and/or stenography proficiency as required), or for Clerk GS-4.

- (c) All of the experience requirements for the GS-3 level may be met by (1) completion of 1 academic year or full-time business school or 1 academic year of education above the high-school level; or (2) qualifying for Clerk-Typist GS-3, Clerk-Stenographer GS-3 (including the demonstration of required typing and/or stenography proficiency, as required), or Clerk GS-3.
- (d) Except when the substitutions provided above are used to meet the *full* requirement, no substitutions may be made at any grade level for the 6 months of experience required at the next lower grade level, or for the 1 year of experience required at the second lower grade level in the Federal service.
- (e) Excess specialized experience may be substituted for the required general experience at any grade level.

Written and performance tests for grades GS-5 through GS-7

In addition to meeting the minimum experience requirements specified for each grade level, competitors for these levels must obtain eligible ratings on written verbal abilities tests. For those positions which require shorthand and/or typing, competitors must also obtain eligible ratings in performance tests in these skills. (Teacher certificates of proficiency in typing or stenography may be accepted in lieu of the applicants' taking and passing performance tests, subject to the same conditions as those described in the X-118 standard for Clerk-Typists, Clerk-Stenographers, and Clerk-Dictating Machine Transcribers.)

The written tests may be waived for noncompetitive actions, but not for appointments outside the register, provided there is other adequate evidence of the ability of the applicant to perform the duties of the position.

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For those applicants who meet the minimum experience requirements and who qualify in performance tests (or on an equivalent basis) as required:

- (1) *At GS-5*, applicants will be rated on the basis of the score obtained in appropriate written tests.
- (2) *At GS-6 and GS-7*, applicants must pass appropriate written tests, but for qualifying purposes only. The final rating will be based upon an evaluation of their secretarial experience, proficiency and personal qualifications.
- (3) *At GS-8 and above*, the final rating will be based upon an evaluation of secretarial experience, proficiency, and personal qualifications.

Physical requirements

See part II, *Physical Requirements, paragraph 3*; in addition, applicants must possess emotional and mental stability.

Special Note

It is important to note that there is no requirement in the Clerk-Stenographer and Clerk-Typist examination for a screening of the applicants or eligibles on the basis of whether they possess the personal characteristics needed for secretarial positions. Sometimes the eligible may be evaluated in that respect during an employment interview. However, it is generally most advantageous to hire eligibles from the Clerk-Typist, Clerk-Stenographer or Clerk registers for placement into positions of those titles in which the duties are such as to permit appraisal of the appointee's potential as a secretary. If adequate potential is thus demonstrated on the job, reassignment or promotion may then be made to a secretarial position. If adequate potential is *not* thus demonstrated, the appointee may continue as a Clerk-Typist, Clerk-Stenographer, or Clerk so long as the job performance in one of those lines of work is satisfactory. The requirements are so stated that lateral reassignment of Clerk-Typists GS-4, Clerk-Stenographers GS-4, or Clerk GS-4 to secretarial positions GS-4 may be made on the basis of on-the-job appraisals of such employees who are serving in positions which provided "general" experience. At least 6 months of adequate experience in a bona fide GS-4 secretarial position, with the balance of the required year in a GS-4 position which affords "general experience," is fully qualifying for GS-5.

GUIDE FOR EVALUATING
SECRETARIAL QUALIFICATIONS

References: Appendix A to Part II of Handbook X-118
Position Classification Standard for Secretary Series, GS-318

Evaluation Method

In evaluating candidates' qualifications for secretarial positions, there are three principal requirements which form the basis for any appraisal, rating, or ranking. These are (1) the nature and scope of secretarial and other experience, (2) relative proficiency as a secretary, and (3) personal qualities necessary for successful performance of secretarial work. The method used should therefore contain procedures for rating all of these requirements. (For example, the method described on page 28 in Appendix A to Part II of Handbook X-118, adapted so as to combine an evaluation of overall experience with ratings on specific knowledges and skills, would be appropriate for secretarial positions.)

Information concerning candidates' qualifications may be obtained from various sources, including the applicants' own application forms or employment histories; position descriptions; supervisory evaluations; qualifications vouchers; written tests; performance tests; personal interviews; work samples; and other sources.

Use of Performance Tests

Performance tests (or equivalent) are normally required for those positions which involve typing and/or stenography. For in-service placement purposes, if performance tests are given, they may be used for qualifying purposes only, or they may be scored and made part of the final rating. Performance tests are particularly desirable in filling positions at those levels where the candidate otherwise qualifies solely on general experience and has not otherwise demonstrated possession of the required typing or stenographic skills in previous positions. (For further suggestions on tests, see Appendix A to Part II of Handbook X-118.)

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Determining the Nature and Scope of Secretarial and Other Experience

Secretarial experience.—The position classification standard for the Secretary Series, GS-318-0 contains much useful information for the identification of relative levels of experience. For example, nature and scope may be revealed by examining:

- (a) The scope of the supervisor's operations (e.g., his title and position in the organization; the kind of work for which he was responsible; the size of the organization which he managed). Experience as secretary to a supervisor who has a broad scope of operations and program responsibility would normally be of higher value than experience as secretary to a superior whose scope of operations and program responsibility was relatively narrow.
- (b) The nature of the secretary's participation in the work of the supervisor (e.g., the secretary's relative position in the organization; the degree of responsibility for the administrative details of the office and to what extent this responsibility was shared with others). Normally, experience in which the secretary had served as the key point for coordination of a variety of clerical, secretarial, and administrative functions related to the management of the supervisor's program would be of a higher value than experience in which the secretary's responsibility for these functions is limited or shared with other employees in the office.
- (c) The degree of independence with which the secretary performed her work (e.g., the extent to which individual initiative was required in disposing of matters without bringing them to the attention of the supervisor; responsibility for keeping the work of the office running smoothly without unnecessary interrup-

tion of the supervisor; responsibility for preventing bottle-necks in correspondence and office communications; the kinds of matters in which the secretary was authorized to take action for or in the absence of the supervisor). Experience reflecting greater independence should be evaluated higher.

- (d) The extent of the secretary's responsibility for maintaining effective relations for the supervisor with community representatives and the general public, and with others outside the office (e.g., receiving visitors giving and requesting information; making appointments; accepting or declining invitations for the supervisor, assuring that the supervisor's official obligations are met). Experience which has required frequent and extensive public contacts would normally be of a higher value than that which involved occasional and limited public contacts.
- (e) The kinds of situations in which the secretary was required to use her own judgment (e.g., solving office problems; drafting correspondence and other documents; interviewing and recommending the selection of office assistants; recognizing the need for and proposing changes in office procedures and work methods). Experience which has required that the secretary exercise judgment which reflects her supervisor's policies, views, and interests would normally be of a higher value than that which required judgments based largely on specifically applicable internal procedural guides.

If additional information is desirable in determining the level of general experience, or of experience which is other than secretarial, offered by the applicant, the position classification standards appropriate for the types of work involved are useful as references for descriptions of the kinds and levels of work.

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Many of the candidates for promotion or reassignment to secretarial positions were originally appointed from registers resulting from examinations (e.g., Clerk-Stenographer, Clerk-Typist, etc.), eligibility for which did not involve a *requirement* for the traits and characteristics important for successful performance of secretarial work.

Because of the importance of these qualities for successful performance of secretarial work, appointing officers should assure themselves that candidates for promotion or reassignment to secretarial positions possess these traits and characteristics to the required degree.

In appraising candidates' secretarial proficiency and personal qualities, a voucher may be useful for obtaining information about candidates who have worked for other supervisors, for evaluating applicants in terms of requirements of individual secretarial positions, and for making comparisons among candidates. A suggested voucher for secretarial positions has been developed. Samples may be obtained from the appropriate Civil Service Commission Regional Office. Since the primary function of that voucher is to secure *considered* evaluations of the traits described, instructions on its use and overall design preclude, as far as possible, the automatic checking, by the respondent, of the same quality degree on all items, a tendency which sometimes is apparent in the use of this kind of form.

A voucher (e.g., such as that mentioned in the previous paragraph) may be used to obtain information from present or former supervisors, coworkers, teachers, personal references, and other sources. The voucher may be used in various ways in the evaluation and rating process: for example, it may be used on an

"in-or-out" basis; it may be given a gross numeric value for bonus purposes; or each item on the voucher may be considered, or even given an individual numeric value, in arriving at ratings for individual applicants.

Under any one of these procedures those individual items which are not important in the particular secretarial position to be filled need not be considered. (Generally, however, almost all of the items will be found to be pertinent.)

Other Training and Experience

Other training and experience which is believed to enhance the candidates' qualifications may be considered as additional factor(s) and used to award bonuses for rating purposes. Among these are:

- (1) Successful completion of in-service courses which offered training in areas related to the secretarial function, general management or administration, or the program area with which the supervisor is concerned;
- (2) successful completion of educational courses (consider relatedness to the work);
- (3) citations for exceptional work performance;
- (4) demonstrated above-average capacity for solving problems associated with the work of an office;
- (5) active participation in activities of formal organizations such as civic groups, church groups, self-improvement groups, etc., which offer better than usual opportunity to develop superior skill in meeting and dealing with others;
- (6) possession of a certificate as a "Certified Professional Secretary";
- (7) etc.

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