

Project Secretary Course

This is a short course distributed over five modules (Part-1, Modules 1 & 2 and Part-II, Modules 1, 2 & 3) addressing various aspects of the position of a Project Secretary.

This course is designed to benefit anyone who aspires to get trained for the position of Project Secretary. A project could be any of the following cases. For instance, it could be a Greenfield petrochemical or refinery construction project or a major plant turnaround project at an existing power plant or a process modification and plant refurbishment project undertaken at a cement manufacturing plant, or just simply a minor extension to the existing infrastructure at a manufacturing facility.

Whatever the size and complexity of the project may be, the team needs a professional to provide clerical and administrative support and that individual is the Project secretary. Oftentimes, this could just mean those routine office tasks a secretary in any commercial enterprise may be expected to do, such as taking messages, recording meeting minutes, handling correspondence, fixing appointments, and similar admin tasks. But they also assist the management with duties unique to a project setting, such as scheduling meetings, travels, discussion with subcontractors or gathering paperwork needed for project execution.

Through the following 5 lessons, it is analyzed in depth as to what the requirements are for the Project secretary position.

Lesson-1: Key Roles of Project Secretary

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A. Introduction

1. Project Secretary plays a critical role in the success of any project.
2. The person serves as a pivot, focusing on the smooth progress and completion of the project.
3. This short course is for candidates seeking an effective career as a Project Secretary in Process Industries, viz., Power, Petrochemical, Oil & Gas, etc.

The role of a project secretary in the construction industry is critical to the success of any construction project. Project secretaries are responsible for managing and organizing administrative tasks that are crucial to the smooth running of a project. They act as a liaison between project managers, subcontractors, and other stakeholders, ensuring that all parties are kept up to date with project progress and developments.

The person referred to in this context is the project secretary. They serve as a crucial pivot in the construction project, responsible for ensuring the smooth progress and completion of the project. The project secretary plays a vital role in coordinating communication among the various stakeholders involved in the project, such as contractors, engineers, architects, and clients. They also manage project documents, maintain project schedules and budgets, and ensure that all work is completed according to established plans and specifications.

The project secretary is often the go-to person for addressing issues or resolving problems that arise during the construction process, and they are responsible for keeping the project on track and within budget. Overall, the project secretary is an essential figure in the construction project, serving as a pivot that keeps all aspects of the project organized and on schedule.

This short course in project secretary for process industries is designed to provide individuals with the necessary skills and knowledge to assist the project management team and other construction professionals with administrative tasks in the process industries, such as power, petrochemical, oil & gas

B. Objectives

On completion of this course, the person will be able to:

- 1. Demonstrate higher knowledge & understanding to project related secretarial works**
- 2. Co-ordinate and provide support to the Project Team.**
- 3. Work on their own, be self-motivated and proactive**
- 4. Help an organization operate professionally and handling organizational & administrative tasks**

The improvement observed in the above abilities in a person on completion of this course is explained further as follows.

- 1. Demonstrate higher knowledge and understanding of project-related secretarial works.** They will have a thorough understanding of the principles of project management and how administrative support contributes to the success of a project. They will also have an in-depth knowledge of the documentation, communication, scheduling, and cost control tasks that are crucial to the smooth running of a project.
- 2. As a project secretary, one of your primary responsibilities is to coordinate and provide support to the project team.** This involves ensuring that all team members are working together effectively and that everyone has the resources and information they need to do their jobs.
- 3. Project secretary will often be working independently and will need to be self-motivated and proactive.** This means that you should be able to work efficiently without constant supervision and take the initiative to identify and address issues as they arise. You will need to manage your own time effectively, prioritize tasks, and meet deadlines without being reminded. Being proactive means anticipating potential issues before they become problems and taking steps to mitigate them. By being self-motivated and proactive, you can ensure that the

project runs smoothly and that the project team has the support they need to be successful.

4. As a project secretary, you play an important role in helping the organization operate professionally by handling a variety of organizational and administrative tasks. This includes managing project documents and files, scheduling meetings and appointments, coordinating with vendors and subcontractors, and preparing reports and presentations. You may also be responsible for managing budgets, tracking expenses, and ensuring that all paperwork and documentation is completed accurately and on time. By handling these tasks efficiently and professionally, you help to create a well-organized and efficient work environment that supports the success of the project and the organization as a whole.

C. Secretary of a Project

- 1. Assists the project teams in various aspects to keep project operations on track.**
- 2. Manages time efficiently to complete multiple administrative tasks**
- 3. Arranges coordination & exhibits professionalism to represent the company positively**

Descriptions of the above points in detail are as follows.

1. The Project Secretary plays a significant role as a key person in the project management team by assisting the project team in various aspects, to ensure that project operations run smoothly and stay on track. Some of the aspects in which the project secretary is expected to assist the project management team are Document Management, Communication, Scheduling, Cost control, and Coordination.

The meanings of some of the related terms referred in the above point-1 are,

- a) **Documentation management:** The project secretary is responsible for maintaining and organizing project documentation, ensuring that all documents are up-to-date, properly filed, and accessible to the project team.
- b) **Communication:** The project secretary facilitates communication between project stakeholders, including contractors, engineers, project managers, and other team members. They ensure that all parties are kept informed about project progress, timelines, and any changes that may impact the project.
- c) **Scheduling:** The project secretary helps to develop and maintain project schedules, ensuring that deadlines are met, and progress is tracked. They work closely with the project manager and other team members to identify critical paths and dependencies, and to adjust the schedule as necessary.
- d) **Cost control:** The project secretary assists with project cost control by tracking project expenses, managing invoices, and ensuring that project budgets are adhered to. They work closely with the project manager to identify and address any budget overruns and to ensure that all costs are properly documented.
- e) **Coordination:** The project secretary coordinates with subcontractors and suppliers to ensure that materials and equipment are delivered on time and to the correct location. They also ensure that all necessary permits and licenses are obtained and that all regulatory requirements are met.

2. As a project secretary, managing time efficiently is essential to complete multiple administrative tasks effectively.

Some of the tips to project secretary to achieve this time management are, prioritize tasks, set realistic goals, use time management tools, minimize distractions and delegate tasks as explained below.

The meanings of some of the related terms referred in the above point-2 are,

- a) **Prioritize tasks:** Make a to-do list at the start of each day and prioritize tasks based on their urgency and importance. Focus on completing the most critical tasks first.
- b) **Set realistic goals:** Set achievable goals for each day, and work towards completing them. Avoid over committing, as it can lead to burnout and poor productivity.
- c) **Use time-management tools:** Use time-management tools like calendars, timers, and reminders to help you stay on track and manage your time effectively.
- d) **Minimize distractions:** Avoid distractions like social media, personal phone calls, and emails that are not related to work. Focus on the task at hand, and avoid multitasking, which can reduce productivity.
- e) **Delegate tasks:** If possible, delegate some administrative tasks to other members of the team. This can help you focus on more critical tasks and manage your time more efficiently.

3. As a construction project secretary, arranging coordination and exhibiting professionalism is critical to represent the company positively.

Here are some of the tips that can help to achieve above point 3

- a) **Develop good communication skills:** Develop excellent communication skills to interact professionally with contractors, clients, and other team members. Ensure that your tone of voice, choice of words, and body language convey professionalism and respect.
- b) **Keep accurate records:** Keep accurate records of all project-related documents, such as contracts, change orders, and project schedules. This helps to ensure that everyone is on the same page and that there are no misunderstandings.

- c) **Coordinate meetings:** Coordinate meetings between project team members and stakeholders to discuss project progress, issues, and solutions. Ensure that meeting agendas are prepared, minutes are taken, and action items are assigned.
- d) **Be organized:** Be organized by keeping your work area tidy, using filing systems to store project documents, and managing your time effectively to meet project deadlines.
- e) **Exhibit a positive attitude:** Exhibit a positive attitude towards your work, colleagues, and clients. This helps to create a positive work environment and contributes to the success of the project.

D. Need for a Secretary in Project

- 1. Project Office needs administrative professionals to coordinate with stakeholders, organize various activities efficiently, and assist in running the project smoothly.**
- 2. Projects need a person with expertise in managing administrative as well as clerical duties.**
- 3. Project heads need a competent confidant who can work closely with & assist them with updated information on the project.**

Above points are well explained further below:

The need for a secretary in a project office arises because project offices require administrative professionals to coordinate with stakeholders, organize various activities efficiently, and assist in running the project smoothly. The project secretary plays a critical role in providing administrative support to the project team, enabling them to focus on the core aspects of the project such as design, engineering, and construction.

Projects often require a person with administrative and clerical expertise to manage the day-to-day operations and ensure that the project runs smoothly. This person would typically be responsible for tasks such as scheduling meetings, managing project documentation, coordinating with team members, and handling other administrative duties as needed. They may also need to communicate with stakeholders, track project progress, and provide updates to project managers or other team members. Having a skilled administrative and clerical professional on the project team can help ensure that the project stays on track and that everyone has the information and resources they need to do their jobs effectively.

A project head often needs a competent confidant who can work closely with them to provide updated information on the project. This person would typically be responsible for gathering and organizing data related to the project, monitoring progress, identifying risks and issues, and communicating updates to the project head. They may also be involved in brainstorming solutions to problems, developing project plans and timelines, and collaborating with other team members. Having a trusted and competent confidant can help the project head make informed decisions and stay up to date on the project's status. This can ultimately help ensure the success of the project and the satisfaction of all stakeholders involved.

E. Responsibilities of Project Secretary

- 1. The Project Secretary is responsible for keeping track of all Project related information.**
- 2. The person shall have free access to all documentation; ensure updated versions of administration-related documents & records.**
- 3. The person shall have key project records in suitable media and form and share the same with project head and team members, as needed.**
- 4. We shall follow a clear desk policy; meaning all documents must be processed and filed daily as per company procedures.**
- 5. Works in tandem with Document Controller and steps in during his / her absence.**
- 6. Duplicates as the Document Controller as well, in smaller projects.**

The above information is well explained point wise below:

Point 1: Keeps track of information flow & shares relevant documents in suitable media with the project team as needed.

- As a project secretary, one of your main responsibilities is to ensure that information flows smoothly among team members. This includes tracking all relevant documents and sharing them in a suitable medium, such as email, shared drives, or project management tools.
- You need to be proactive in managing document distribution and communication, making sure that team members have access to the latest versions of documents to avoid any confusion or delays in the project.
- You may need to coordinate with different team members, departments, or external stakeholders to gather, organize, and disseminate information, so effective communication and coordination skills are crucial.

Point 2: Ensures access to updated versions of administration-related documents & records.

- It is essential to maintain up-to-date and accurate administration-related documents and records for the project. This may include project plans, budgets, schedules, contracts, meeting minutes, and other important project-related documents.
- As a project secretary, you should establish a system for managing and organizing these documents, ensuring that team members can easily access the latest versions when needed.
- Regularly reviewing and updating documents and records is also important to ensure that the project progresses smoothly and in accordance with established procedures and requirements.

Point 3: Shall follow a clear-desk policy, i.e., documents are processed and filed daily as per company procedures.

- Maintaining a clear-desk policy is crucial to ensure that project documents are organized, secure, and easily accessible when needed. This means that documents

should not be left unattended on desks but should be processed and filed daily as per company procedures.

- As a project secretary, you need to establish and follow standard operating procedures for document processing, filing, and storage. This may include organizing documents into relevant folders, labeling them properly, and following company guidelines for document retention and disposal.
- Keeping a clean and organized workspace not only helps in efficient document management but also demonstrates professionalism and confidentiality in handling project-related information.

Point 4: Works in tandem with Document Controller and steps in during his/her absence.

- In larger projects, there may be a dedicated Document Controller responsible for managing all project documents. As a project secretary, you will work closely with the Document Controller and provide support in managing project documents.
- This includes coordinating with the Document Controller to ensure that documents are properly categorized, labeled, and stored, and that team members have access to the latest versions.
- In the absence of the Document Controller, you may need to step in and take over their responsibilities to ensure that the document management process continues smoothly and there are no delays or disruptions in the project.

Point 5: Duplicates as Document Controller in smaller projects.

- In smaller projects where there may not be a dedicated Document Controller, the project secretary may need to take on the additional responsibility of managing project documents.
- This may involve setting up document management processes, maintaining document registers, tracking document versions, and ensuring that team members have access to updated documents.
- It is important to understand the document management requirements of the project and ensure that all project documents are properly managed and organized, regardless of the size of the project.

Overall, as a project secretary, you play a crucial role in managing project documents, ensuring effective communication, and maintaining document integrity. Your attention to detail, organizational skills, and ability to work in tandem with other team members, including the Document Controller, are critical to the success of the project.

F.1: KEY ROLES OF PROJECT SECRETARY - Focal point of project information

- 1. Updates project information to Project Team & Stakeholders**
- 2. Handle key telephonic conversations & maintain records**
- 3. Originate and maintain key internal & external correspondence**
- 4. Prepare and control project administrative records as per procedure**
- 5. Maintain mandatory records for regulatory authorities & manage audits**
- 6. Maintain updated team contact database and distribute emails internally**

The above points are explained further in detail below

As project secretary, it is important to keep the project team and stakeholders informed of project progress and updates. You may be responsible for updating project plans, schedules, budgets, and progress reports, and ensuring that this information is accurately and timely communicated to all stakeholders. Effective communication is critical to the success of any construction project, and as a construction project secretary, you play a key role in ensuring that all stakeholders are informed and aligned throughout the project lifecycle. This can help to minimize delays, avoid miscommunications, and ultimately, ensure that the project is completed on time and within budget.

Moreover, you will be required to manage the office front desk and handle all external telephone calls and visitors. This could include answering calls, taking messages, and forwarding calls to appropriate team members. This can help to ensure that important information is not lost or forgotten, and that all stakeholders are informed of key project updates and decisions.

Further, you would be responsible for originating and maintaining key internal and external correspondence related to the project. This includes drafting emails, letters, memos, and other documents on behalf of the project team or organization, and ensuring that they are properly formatted, edited, and sent to the appropriate recipients. You may also be responsible for maintaining a record of all correspondence, including both incoming and outgoing messages, to ensure that all stakeholders are informed and aligned throughout the project lifecycle. Effective communication is critical to the success of any construction project, and as a construction project secretary, you play a key role in ensuring that all correspondence is accurate, timely, and effective.

Additionally, preparing and controlling project administrative records according to established procedures also rests on your shoulders. This includes creating and maintaining project files, tracking document revisions, and ensuring that all documents are properly filed and organized. You may also be responsible for managing project-related expenses and budgets, tracking project progress, and preparing reports and presentations for project stakeholders. By following established procedures for managing project administrative records, you can help to ensure that all stakeholders have access to accurate and up-to-date information throughout the project lifecycle.

As a construction project secretary, you are required to take care of all conformance and compliance requirements, and maintain mandatory records required by regulatory authorities, such as permits, licenses, and certificates, and managing audits related to these records. Some or all of these may be required to be presentable in physical form with wet-ink signatures of the authorized personnel.

Besides, for ease of communication you need to maintain an updated team contact database for distributing emails and other forms of communicate internally. By maintaining an updated team contact database and distributing emails internally, you can help to ensure that all project team members are informed and aligned throughout the project lifecycle, and that communication flows smoothly and efficiently.

F.2: KEY ROLES OF PROJECT SECRETARY – On working with all levels

- 1. Undertake other ad hoc administrative duties as may be required from time to time**
- 2. Ensure that discretion is exercised when dealing with sensitive information, enquiries related to personnel in the project.**
- 3. Ensure that appropriate confidentiality is maintained at all times in the conversations and correspondence with team members.**
- 4. Thorough knowledge of, and compliance with, standard operating procedures and train team members in the same.**
- 5. Ability to maintain cordial working relationships with all levels of management and staff both internally and externally.**

GENERAL NOTE ON ROLE:

The role of a project secretary is crucial in ensuring the smooth running of any project, working with all levels of the team to ensure effective communication and coordination. As the main point of contact between team members, the project secretary is responsible for facilitating meetings, preparing documentation, and ensuring that deadlines are met. They play a key role in managing schedules, budgets, and resources, and are often tasked with identifying and addressing any issues that may arise during the project lifecycle. By working closely with all levels of the team, the project secretary helps to ensure that everyone is on the same page and working towards the same goal, ultimately leading to a successful project outcome.

The role of a construction project secretary is explained further as follows:

- Undertake other ad hoc administrative duties from time to time in addition to the core responsibilities of the role. These duties may include managing emails and phone calls, maintaining records and filing systems, preparing reports, and assisting with budget tracking and invoicing. Other tasks may include arranging travel and accommodation for team members, coordinating meetings and events, and managing office supplies and equipment. Ad hoc administrative duties can vary

widely depending on the specific needs of the project and the organization, but they are typically designed to support the overall success of the project by ensuring that administrative tasks are completed efficiently and effectively. As such, project secretaries should be prepared to adapt to changing priorities and handle multiple tasks at once.

- Exercise discretion when dealing with sensitive information and enquiries related to personnel in the project. This includes confidential information such as personal details, financial information, and other sensitive data that should not be disclosed to unauthorized parties. Project secretaries must ensure that they comply with relevant data protection and privacy laws and take appropriate measures to safeguard the confidentiality of the information they handle. They should also be able to handle enquiries related to personnel in a professional and courteous manner, while maintaining the necessary confidentiality and sensitivity. By exercising discretion and professionalism, project secretaries can build trust with team members and stakeholders and contribute to the overall success of the project.
- Maintain appropriate confidentiality at all times in your conversations and correspondence with team members. Maintaining confidentiality is a critical aspect of the construction project secretary's role. They are privy to sensitive information about the project and team members, and it is their responsibility to ensure that appropriate confidentiality is maintained at all times in conversations and correspondence. This means that they must be mindful of the information they share, both in verbal and written communication, and ensure that it is only shared with those who have a legitimate need to know. The project secretary must also ensure that confidential information is stored securely and disposed of appropriately when it is no longer needed. By maintaining confidentiality, the project secretary can build trust and confidence with team members and help to create a positive and professional work environment.
- A thorough knowledge of and compliance with standard operating procedures (SOPs) is essential for the construction project secretary to ensure the smooth

running of the project. SOPs provide a structured approach to carrying out tasks, which helps to ensure consistency and minimize errors. The project secretary must have a complete understanding of the SOPs and ensure that they are followed by all team members. They must also be able to train team members on the SOPs to ensure that they are fully understood and implemented. By adhering to SOPs, the project secretary can help to minimize risk and ensure that the project is completed on time, within budget, and to the required quality standards.

- The ability to maintain a cordial working relationship with all levels of management and staff, both internally and externally, is a crucial skill for a project secretary. As a key member of the project team, the project secretary often acts as a liaison between different departments and stakeholders and is responsible for facilitating communication and collaboration. This requires strong interpersonal skills, the ability to build and maintain relationships, and a professional demeanor. A project secretary who can cultivate positive relationships with all parties involved in the project can help ensure that communication flows smoothly, issues are resolved quickly, and everyone feels heard and valued. This can contribute to a positive and productive work environment and ultimately help the project achieve its goals.

F.3: KEY ROLES OF PROJECT SECRETARY – Managing Meetings & Travel Arrangements

1. Co-ordination of project meetings including room bookings, catering arrangements, transport bookings, etc., as required
2. Maintain meeting details, viz., location, time/duration, transport arrangements, participation, absences etc.,
3. Organize travel arrangements (hotel, transport, visa, etc.,) both within country and abroad.

GENERAL NOTE

Managing meetings and travel arrangements is important in a project for several reasons. Firstly, it helps to ensure that all necessary team members and stakeholders are able to attend meetings and collaborate effectively, which can enhance communication and lead to better project outcomes. Secondly, effective management of travel arrangements ensures that team members are able to attend meetings in different locations on time, which is critical to meeting project deadlines. Additionally, managing travel arrangements can help to reduce costs associated with travel by identifying cost-effective options and avoiding unnecessary expenses. Overall, managing meetings and travel arrangements is essential for the success of a project, as it helps to ensure that all team members and stakeholders are able to participate and contribute to the project's goals.

The above part of a construction project secretary's role is explained further as follows:

- Coordinating project meetings, which include booking meeting rooms, arranging for catering services, arranging for transportation if necessary, and ensuring that all logistics are in place for a successful meeting. This may involve communicating with internal and external stakeholders to determine availability and negotiating with vendors to secure the necessary resources. By effectively coordinating project meetings, you can help to ensure that all participants are able to attend, that the meeting runs smoothly, and that decisions are made efficiently.
- Maintaining detailed records of project meetings. This includes recording the date, time, location, duration, and agenda of each meeting, as well as a list of participants and any key outcomes or action items. You may also need to track attendance and absences and ensure that all relevant stakeholders are informed of meeting dates and times in advance. By maintaining detailed records of project meetings, you can help to ensure that all team members and stakeholders are well-informed about project progress, and that decisions are made in a transparent and collaborative manner.

- Organizing travel arrangements for project team members and stakeholders, both within the country and abroad. This may involve coordinating hotel bookings, arranging transportation to and from airports or other travel hubs, and assisting with the application process for visas or other travel documents. You may also need to communicate with travel agencies or vendors to ensure that all arrangements are made in a timely and cost-effective manner. By effectively organizing travel arrangements, you can help to ensure that project team members are able to travel to project sites or meetings as needed, and that they have the necessary resources and support to carry out their work effectively.

End of Lesson I