**EXECUTIVE ASSISTANT**

*Note: This material is not intended to represent a complete position description; it is meant as a job aid to provide a foundation for completing a detailed individual description. All functions and tasks listed below will not apply to every position and this is not an exhaustive list of potential duties. Supervisors should select any of this material which applies to provide a framework for their description, then add detail, context, and other functions relevant to their specific needs. This material is also competency-level neutral. In addition to functions and tasks, other considerations including but not limited to scope, organizational placement, and reporting relationship are key determining factors in position leveling.*

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| **FUNCTIONS** | **TASKS** |
| Gatekeeping  | * Serves as the primary contact and direct link to the executive
* Serves as agent of the executive within defined parameters
* Screens inquiries and determines priority based on knowledge of the executive’s preferences; brings critical issues to the executive’s immediate attention; reroutes some issues to other areas for handling as needed using independent judgment or discretion
* Greets and directs visitors
* Responds to inquiries regarding the organization, or redirects them as appropriate
* Coaches others on the working style and preferences of the executive
* Develops strong working relationships with internal and external constituents
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| Calendar Management | * Manages the executive’s calendar to include scheduling group meetings involving others with competing and limited availability
* Schedules, moves, or declines meeting requests based on knowledge of the executive’s preferences and priorities
* Schedules daily activities so that the executive’s time is used as efficiently as possible by minimizing travel between locations, including all necessary parties, allowing for adequate preparation, etc.
* Develops travel itineraries
* Anticipates long-term needs when working with future scheduling
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| Administrative Duties | * Coordinates or directs office workflow; establishes office workflow procedures and processes
* Ensures supplies are ordered and stocked
* Organizes and submits requests and work orders for repairs, upgrades, computer installation, equipment maintenance, etc.
* Serves as a space manager and assigns work areas
* Arranges travel for the executive as directed, including flight and hotel reservations, ground transportation, parking, etc. Submits travel reimbursement requests.
* Provides budget or discretionary fund reporting as needed
* Supervises student, temporary, or permanent office staff as applicable *(see supervisory function if this applies to permanent employees)*
* Plans and executes special events as directed
* Provides administrative assistance to others in the organization as directed
* Records, formats, and distributes meeting minutes
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| Research and Presentations | * Researches, compiles, and edits information on a variety of topics on behalf of the executive
* Creates, edits, and/or updates presentations, narratives, or talking points
* Creates and maintains databases
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| Correspondence and Communication | * Drafts and edits memos, policies, presentations, contractual agreements, memoranda of understanding, articles, etc. in the style of the executive
* Intakes and prioritizes email and direct mail communications, often handling confidential information
* Represents the executive and/or the organization on internal and/or external committees, working groups, etc.
* Serves as a liaison with internal and external parties to gather or disseminate information
* Speaks on behalf of the executive on a variety of administrative and programmatic matters
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| Records and Files | * Builds and maintains a filing system for the office and/or the executive’s personal files, often handling confidential information
* Aligns internal files with document retention guidelines
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| Project Management | * Leads, manages, or participates in a variety of projects on behalf of leadership as assigned. Projects will vary in size, scope, and subject and will regularly involve research, data collection, and consultation with subject-matter experts in a variety of topics. The incumbent will need to independently set goals and timelines, manage deliverables, communicate progress to stakeholders, and interact with constituents both internal and external to the University. Responsibilities will include serving on and/or leading working groups and assigning tasks. Outcomes from these projects will often be used to inform executive-level decisions.
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| Personnel Duties | * Assists the executive with preparing for direct-report performance reviews or department-wide performance management cycles
* Schedules and coordinates search committees and candidate interviews
* Assists in facilitating the promotion and tenure process
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| Team Lead | * Directs the daily workflow of other staff members by assigning tasks
* Trains new staff members on work methods, policies, and practices
* Provides feedback to supervisors on team members for performance evaluations
* Serves as a resource to other team members for questions or work issues
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| Supervision | * Provides full supervision to [define subordinate positions]; interviews and makes hiring decisions/recommendations; recommends initial pay rates and subsequent adjustments; ensures employees are trained in job responsibilities and provides for ongoing development; manages the performance review process and assigns performance ratings; addresses performance deficiencies and disciplinary issues as needed; sets work schedules and approves leave requests
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| Other Duties (5% max) | * Other duties as assigned by management to meet business needs
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**STATE–DEFINED COMPETENCIES** *(Use to complete section 7 of the position description by defining how these apply to your specific job. All competencies may not apply to all jobs. Do not add any additional competencies beyond those provided by the state.)*

* Interpersonal Skills
* Knowledge – Program
* Problem Solving
* Planning and Organization
* Communication – Written
* Information/Records Administration
* Budgeting

**MINIMUM TRAINING AND EXPERIENCE** *(Cut and paste into section 8 of the position description form with no additions or deletions):*

High school diploma or equivalency and three years of progressively responsible administrative/office management experience; or Associate’s degree in secretarial science, business administration, or a related discipline and one year of progressively responsible administrative/office management experience ; or Bachelor’s degree, preferably in business administration or a related discipline; or equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.