



## EXECUTIVE ASSISTANT – CONFIDENTIAL

### **DEFINITION**

Under direction, performs a variety of highly responsible, confidential, and complex administrative and secretarial support services for assigned executive management; acts as the first point of contact for assigned executive and provides information to the public and staff requiring considerable knowledge of Office and department services, policies, and procedures; compiles information and prepares, reviews, processes, and/or maintains a variety of detailed and complex lists, databases, computerized systems, spreadsheets, records, and reports; coordinates, schedules, and maintains the calendar of assigned executive management; handles and maintains documents, information and/or reports related to the Office's collective bargaining activities; and performs related duties as required.

Employees in this classification are designated as "confidential employees" as this term is used within the Educational Employment Relations Act (EERA), 3540.1(c). As such, employees in this classification assist management personnel with developing collective bargaining proposals and/or have regular access to information which contributes to the development of management's collective bargaining positions and/or labor relations strategies.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives direction from assigned supervisory or management personnel. Exercises no direct supervision over staff.

### **CLASS CHARACTERISTICS**

This classification is responsible for performing highly responsible and complex administrative support to executive management and associated staff. The work requires extensive public contact, the frequent use of tact, discretion, and independent judgment, knowledge of Office activities, and the ability to conduct independent projects. This class is distinguished from other office administrative classes in that the nature, scope, and diversity of responsibilities originating at an agency-wide level require a broader understanding of Office functions and the capability of relieving assigned executive management of day-to-day administrative and coordinative duties. This class is further distinguished from the Executive Assistant in that the latter are not designated as "confidential employees" and do not perform duties that involve assisting management personnel with developing collective bargaining proposals and/or having regular access to information which contributes to the development of management's collective bargaining positions and/or labor relations strategies. This class is further distinguished from the Executive Assistant to the Superintendent in that the latter is specifically assigned to the Superintendent of the Office.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Performs a variety of highly responsible, confidential, and complex administrative and secretarial support services for assigned executive management; ensures efficient office operations, and proper and timely completion of projects and activities; plans, coordinates, and organizes office activities.
- Serves as the primary administrative assistant to assigned executive management; serves as a liaison and coordinates communications, public relations and information between assigned executive management, staff, school districts, public agencies, the general public, and other related parties; identifies and resolves issues or concerns if needed.
- Receives, screens, routes, and responds to incoming telephone calls and e-mails from staff, external agencies, officials, and/or the general public; provides information and responds to related questions or requests (e.g., operations, functions, activities, regulations, policies, and procedures related to the assigned area); addresses and resolves issues and concerns; refers issues to the appropriate staff or department as needed.
- Handles and maintains documents, information and/or reports related to the Office's collective bargaining activities, including attending meetings, taking minutes, and providing access to information in support of labor negotiations and/or contract administration; maintains confidentiality of critical documents, reports, and/or information.
- Composes, types, formats, and proofreads a variety of documents and correspondence including presentations, letters, emails, forms, bulletins, memoranda, agenda items, reports, and related materials; reviews and revises for punctuation, spelling, and grammar.
- Coordinates, schedules, and maintains the calendar of assigned executive management, including various activities, meetings, conferences, events, training sessions, and appointments; coordinates travel, conference arrangements, and related activities and events; takes, transcribes, and distributes minutes as appropriate.
- Coordinates logistics for both internal and external meetings, conferences, trainings, workshops, and other events; coordinates facility reservations, catering, contracts, advertising, promotion, ticketing, invoicing, and other necessary processes; sets up equipment and supplies for meetings and other events as needed; takes, transcribes and distributes minutes as directed.
- Compiles information and prepares, reviews, processes, and/or maintains a variety of detailed and complex lists, databases, computerized systems, spreadsheets, records, and reports related to correspondence, contracts, financial activity and assigned duties; establishes and maintains filing systems; maintains and orders office supplies.
- Provides support in the preparation of the department budget; monitors and tracks expenditures including creating, reviewing, and processing payroll, purchase requisitions, reimbursements, and/or purchase orders.
- Performs related special projects and prepares various forms and reports on behalf of the assigned executive management; attends to administrative details on special matters as assigned.
- Observes and complies with all Office and mandated safety rules, regulations, and protocols.
- Performs related duties as required.

## **QUALIFICATIONS**

### **Education and Experience:**

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

- Equivalent to an associate degree with major coursework in public administration, business administration or a related field; and
- Four (4) years of increasingly responsible experience providing office management and/or administrative support to executives.

### **Licenses and Certifications:**

- Some positions may require possession of a valid California Driver's License and a satisfactory driving record to be maintained throughout employment.

**Knowledge of:**

- Organization and function of public agencies, including the role of an elected Board, cabinet, and appointed boards and commissions.
- Administrative office operations and functions.
- Principles and practices of business documentation composition and development.
- Practices and methods of office management and administration, including the use of standard office equipment.
- Principles and practices of data collection and report preparation.
- Business letter writing and the standard format for reports and correspondence.
- Business mathematic principles.
- Principles and practices of record keeping and records management.
- Applicable federal, state, and local laws, codes, and regulations as well as industry standards and best practices pertinent to the assigned area of responsibility.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and Office staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern 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:**

- Maintain confidentiality and discretion in handling and processing confidential information and data related to the collective bargaining process.
- Perform varied, confidential, and responsible office administrative work requiring the use of judgment, tact, and discretion.
- Make accurate arithmetic, financial, and statistical computations.
- Understand the organization and operation of the Office and of outside agencies as necessary to assume assigned responsibilities.
- Participate in the preparation of the department budget, including tracking and monitoring expenditures.
- Demonstrate a high level of sensitivity, tact, discretion, and professionalism in representing the executive management to other staff and external agencies.
- Maintain professionalism and composure, and handle disputes and complaints in a calm, courteous, and tactful manner.
- Prepare and maintain accurate and precise written documents such as reports, records, forms, agendas, presentations, and correspondence.
- File and maintain automated and hardcopy records with accuracy.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to the work performed.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- 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.
- Effectively use computer systems, software applications relevant to work performed, and modern

business equipment to perform a variety of work tasks.

### **PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

### **ENVIRONMENTAL CONDITIONS**

Employees work in an 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 divisional policies and procedures.