

Draft Classification Standards – Rev. 03/29/2024
Executive Assistant Series

Class Title	Class Code	Issue Date	FLSA
<i>Executive Assistant I</i>	XXXX	XXXX	<i>Non-Exempt</i>
<i>Executive Assistant II</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Executive Assistant III</i>	XXXX	XXXX	<i>Exempt*</i>

OVERVIEW:

Positions classified within the Executive Assistant series are directly responsible for providing high-level administrative support for a university executive. They are responsible for playing a critical role by independently organizing the executive's schedule, coordinating meetings and events, and facilitating effective communication with internal and external stakeholders. Positions prioritize and maintain calendars; independently monitor and draft correspondence; select and coordinate travel details; plan and coordinate meetings, events, and administrative projects; and oversees files and records.

Positions are assigned to classifications within the series based on the scope and complexity of executive assistant activities; degree of independence and judgement; experience, knowledge, skill, and ability required; degree of planning, analysis, and execution required by the position; impact and risk to the university; and nature of supervision received.

Positions perform tasks that may include, but are not limited to, communicating with internal and external stakeholders, representing the executive to a diverse community of stakeholders; providing programmatic and administrative support and project management; planning and scheduling travel, meetings, and conferences; and drafting documents, memos, reports, and presentations. Higher levels within the series build upon and include the knowledge and skill requirements and work assignments of lower levels.

Executive Assistant I – Incumbents in positions at this level serve primarily as individual contributors providing day-to-day administration of a program, and/or performing a variety of administrative and technical duties requiring knowledge of methods and procedures in support of an organizational unit. Administrative and analytical work relates primarily to operations and procedures. Assignments may be routine in nature and involve performing various duties related to supporting the university executive. Routinely engages various stakeholders to ensure continuity for the executive’s schedule.

Executive Assistant II – Professional who applies acquired executive assistant job skills, and knowledge of university policies and procedures to complete significant assignments, projects, and tasks of moderate technical scope and complexity. Draws from prior experience and knowledge of executive administration and project management to exercise judgment while ensuring the efficient operation of the executive’s office. Supports the executive in a variety of tasks such as, writing documents and memos to support strategic plans and programs; conducting research and analysis of confidential information to support college personnel and student planning; planning and coordinating meetings

** This classification as outlined in this document meets the duties test of the Administrative Exemption. An employee’s actual exemption status may differ based on salary rate and actual duties performed.*

and events; managing projects; and facilitating effective communication with internal and external stakeholders.

Executive Assistant III – Professional who applies advanced job skills, in-depth organizational and stakeholder acumen, and project management skills to complete substantive assignments, projects, and related work of significant technical scope and complexity. Exercises advanced discernment and in-depth knowledge of the departments programs and priorities as well as the executive's working style; and university policies, guidelines, and standard operating procedures to determine appropriate action. Plays a critical role in organizing complex projects, coordinating high-level meetings and events, and facilitating effective communication with internal and external stakeholders.

TYPICAL PROGRAMS, ACTIVITIES, AND CORE FUNCTIONS/DISCIPLINES (*May include but are not limited to*):

- ***Calendar Organization*** – Organizes the executive's calendar. Plans and schedules appointments, meetings, and events. Coordinates and prioritizes meeting requests, ensuring efficient use of the executive's time. Anticipates scheduling conflicts and proactively resolves conflicts or makes alternative arrangements. Prepares meeting materials, agendas, and briefing documents as needed.
- ***Meeting and Event Coordination*** – Plans and coordinates logistics for meetings, conferences, and special events, both on and off-campus. Arranges travel accommodations, transportation, and itineraries for the executive and other participants. Prepares meeting agendas, takes minutes, distributes meeting materials, and follows-up on action items. Coordinates catering, audiovisual equipment, and other event-related services as required.
- ***Communication Administration*** – Monitors incoming and outgoing communications on behalf of the executive, including phone calls, emails, and mail. Drafts and edits correspondence, reports, and presentations for the executive's review and approval. Maintains a professional and organized filing system for documents and records. Responds to inquiries and requests for information, redirecting, or escalating as appropriate.
- ***Relationship Coordinator*** – Serves as a liaison between the executive and internal and external stakeholders, including senior leaders, faculty, staff, and external partners. Builds and maintains positive relationships with key stakeholders, representing the executive's office in a professional and courteous manner. Coordinates and facilitates communication and collaboration among various departments and individuals. Assists in the preparation of reports, presentations, and materials for board meetings and other high-level meetings.
- ***Office Administration*** – Manages the executive's office operations, including maintaining office supplies, equipment, and technology. Coordinates and prioritizes incoming requests, inquiries, and tasks, ensuring timely and accurate responses. Prepares and processes expense reports, invoices, and other financial documents. Assists in the preparation and monitoring of the executive's budget. Handles confidential and sensitive information with the utmost discretion and strict confidentiality. Exercises judgment in determining the appropriate level of access to information and the dissemination of

information. Maintains confidentiality of executive discussions, decisions, and strategic initiatives. Complies with ethical standards and professional conduct in all interactions and communications.

EXECUTIVE ASSISTANT I

Working under general supervision, provides administrative support to the executive. Applies thorough knowledge of department programs and priorities, and executive assistant expertise to play a crucial role in organizing projects, coordinating executive-level meetings and events, facilitating communication with internal and external stakeholders, providing information management, and conducting research to support program administration and personnel management. Handles confidential information, exercises discretion, and ensures the efficient operation of the executive's office. Assignments require handling of multiple work priorities and accountability for own work results.

Work assignments typically include some or all of the following:

- ◆ Independently maintains the executive's calendar, scheduled appointments, meetings, and events.
- ◆ Prepares meeting materials, agendas, and briefing documents, as requested.
- ◆ Arranges executive travel plans and accommodations. Utilizes independent judgement in determining details for the executive and other relevant participants.
- ◆ Reviews, and may act upon, incoming and outgoing communications on behalf of the executive.
- ◆ Maintains a professional organizing system for relevant documents and records.
- ◆ Handles confidential and sensitive information with discretion and maintains strict confidentiality.
- ◆ Maintains office supplies, equipment, and technology.
- ◆ Assists in the preparation and monitoring of the executive's budget.
- ◆ Prepares and processes expense reports, invoices, and other financial documents.
- ◆ Coordinates projects within or with other units.
- ◆ Provides lead work direction and training to administrative staff, student employees, and/or volunteers.
- ◆ Serves as a point of contact and liaison between the executive and internal and external stakeholders, including senior leaders, faculty, staff, and external partners.

MINIMUM QUALIFICATIONS:

Knowledge and Skill:

- ◆ Working knowledge of general administrative practices, programs, and methodologies.
- ◆ General knowledge of business administration.
- ◆ Skill in following guidelines and providing input and feedback.
- ◆ Strong organizational and time management skills to plan, organize, and prioritize work.
- ◆ Analytical skills to collect, analyze, and summarize data and metrics.
- ◆ Strong communication and interpersonal skills.
- ◆ Excellent attention to detail and accuracy.
- ◆ Skilled in leading, training, and mentoring administrative staff, student employees, and volunteers.
- ◆ Proficiency in current word processing, spreadsheet, and relevant software applications.

- ◆ Ability to handle confidential and sensitive information with discretion and maintain strict confidentiality.
- Ability to work independently and as part of a team and build relationships with diverse stakeholders.
- ◆ Flexibility to adapt to changing priorities and deadlines.

Experience and Education:

Equivalent to a bachelor's degree in a related field. Relevant education and/or experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis.

EXECUTIVE ASSISTANT II

Working independently under general supervision, provides advanced administrative support to the executive. Applies in-depth knowledge of department programs and priorities, and advanced executive assistant expertise to play a crucial role in organizing complex projects, coordinating executive-level meetings and events, drafting, and managing communication with internal and external stakeholders, providing information management, and conducting detailed and complex research to support program planning and delivery. Handles confidential information, exercises discretion, and ensures the efficient operation of the executive's office.

In addition to duties performed by Executive Assistant I, the Executive Assistant II typically performs the following duties:

- ◆ Executes special projects as assigned by the executive.
- ◆ Collaborates with cross-functional teams and departments to facilitate project implementation and ensure alignment with strategic goals.
- ◆ Conducts relevant research, gathers data, and prepares reports and presentations as required.
- ◆ Oversees the executive's calendar, proactively scheduling and prioritizing meetings and events, and anticipating scheduling conflicts.
- ◆ Coordinates complex schedules, travel arrangements, and competing priorities.
- ◆ Prepares meeting materials, agendas, briefing documents, etc. and ensures the executive is well-prepared for engagements.
- ◆ Oversees logistics for executive-level meetings, conferences, and other events.
- ◆ Prepare meeting agendas, take minutes, and distribute meeting materials.
- ◆ Draft and edit correspondence, reports, and presentations for the executive's review and approval.
- ◆ Exercises judgment in determining the appropriate level of access to information and the dissemination of information.
- ◆ Provides recruitment support or position management support to the unit.
- ◆ Maintains confidentiality of executive discussions, decisions, and strategic initiatives.
- ◆ Maintains the executive office/unit services by organizing operations and procedures.
- ◆ May provide lead work direction, guidance, and mentorship to other staff.

MINIMUM QUALIFICATIONS:

In addition to Executive Assistant I knowledge and skill requirements, work assignments typically require:

- ◆ Working knowledge of executive-level administrative practices, problems, and methodologies.
- ◆ Strong project planning and organizational skills to plan, organize, and manage multiple projects.
- ◆ Advanced communication and interpersonal skills to work effectively in a diverse environment and advise managers, staff, and faculty regarding policies and procedures.
- ◆ Strong analytical skills in order to evaluate and interpret data to develop sound conclusions and recommendations.
- ◆ Ability to work independently, exercise judgment, and make decisions in a fast-paced and dynamic environment.
- ◆ Strong skills in leading, training, and mentoring administrative staff.

Experience and Education:

Equivalent to a bachelor's degree in a related field and two years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

EXECUTIVE ASSISTANT III

Working independently under minimal supervision, oversees highly sensitive and confidential administrative, operational, and project support work for university leadership. Work is focused on ensuring alignment with overall objectives. Demonstrates advanced discernment in selecting methods and techniques for obtaining solutions. Often provides guidance to other administrative staff. Manages complex and high impact special projects. In collaboration with management, assesses, formulates, and evaluates programs, policies, and procedures. Decision-making is based on best practices; relevant standards, guidelines, organizational policy; and overall strategies and goals. Handles multiple work priorities and may provide lead work direction with accountability for results.

In addition to duties performed by Executive Assistant II, Executive Assistant III typically performs the following duties:

- ◆ Provides strategic support to the executive, assisting in the development and implementation of institutional goals and initiatives.
- ◆ Monitors and tracks progress on strategic initiatives, ensuring alignment with the institution's mission and vision.
- ◆ Collaborates with senior leaders and stakeholders to facilitate the execution of strategic projects and initiatives.
- ◆ Coordinates complex projects and initiatives on behalf of the executive, ensuring successful outcomes and timely completion, including developing project plans, establishing timelines, and allocating resources.
- ◆ Performs a broad spectrum of work.

MINIMUM QUALIFICATIONS:

In addition to Executive Assistant II knowledge and skill requirements, work assignments typically require:

- ◆ Thorough and advanced knowledge of the principles, problems, and methods of business administration and operational and fiscal management.
- ◆ Excellent project planning skills, with the ability to manage multiple projects and deadlines simultaneously.
- ◆ Advanced public and internal relations skills to effectively represent the university leader, engage and collaborate with internal stakeholders, and manage relationships with external stakeholders.
- ◆ Advanced skill in leading, training, and mentoring other administrative staff.
- ◆ Thorough knowledge of and ability to apply extensive expertise to complex programs and/or administrative specialties, including pertinent laws and regulations.
- ◆ Expertise in administrative survey techniques, operations, and systems analysis, including the ability to interpret and evaluate results to develop sound conclusions and recommend new or revised policies.

Experience and Education:

Equivalent to a bachelor's degree in related field and four years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.