

Position Description Form (PDF)

College: The Best College

Incumbent's Name: T. Jones

Position Title: Executive Secretary

Payband:

Position Code/Number (if applicable):

Supervisor's Name and Title: E. D. Smith, Executive Director, Enrolment Services

Completed by: E.D. Smith

Date: August 4, 2006

Signatures:

Incumbent:
(Indicates the incumbent has read and understood the PDF)

Date:

Supervisor:

Date:

Supervisor's Supervisor:

Date:

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.
2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.
3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.
4. Ensure the PDF is legible.
5. Responses should be **straightforward and concise using simple factual statements.**

Position Summary

Provide a concise description of the overall purpose of the position.

The incumbent provides clerical and secretarial support to the Executive Director, handles the day-to-day operations of the office and provides general information related to enrolment services. The incumbent also provides back-up support to the Office Manager.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of time annually*
Coordinates activities in the Office of the Executive Director to ensure that day-to-day secretarial and clerical support is maintained by: <ul style="list-style-type: none"> - preparing letters, memos, reports, spreadsheets and other materials on a PC using a variety of software, as required - preparing basic budget preparatory work - processing incoming/outgoing mail (Canada Post, fax, courier and email) - contacting internal/external suppliers to order office supplies and maintaining an appropriate level of inventory for office use - serving as first contact for the office, answering inquiries, resolving general complaints (received in person, mail or by phone), or informing students and others concerning correct procedures - making appointments, meetings, travel arrangements for the Executive Director - maintaining the attendance record for the associated departments that report to the Office of the Executive Director - maintaining the office filing system and bring forward filing system (paper and electronic) - selecting the correct forms and entering the appropriate information for a variety of payroll and human resources related issues 	45%
Supports a variety of College Committees related to Enrolment Services to ensure accurate meeting notes and follow-up activities by: <ul style="list-style-type: none"> - attending meetings to record key points and transcribe notes; producing minutes of meetings - following up on action items from meetings that are within the scope of the position or with the individual who has been assigned the task - arranging meetings, booking rooms and ordering appropriate catering or equipment needs - preparing, assembling and distributing necessary materials for the Committee's review 	20%
Performs duties related to general office support to maintain smooth operations by: <ul style="list-style-type: none"> - upon request, initiating routine correspondence - upon request, formatting and inputting necessary information to prepare letters, memos, reports, spreadsheets, presentations and other written materials 	20%
Acts as back-up to the Office Manager during his/her absence.	10%
Performs other related duties as assigned.	5%
	100%

* To help you estimate approximate percentages:

½ hour a day is 7%

1 hour a day is 14%

1 hour a week is 3%

½ day a week is 10%

½ day a month is 2%

1 day a month is 4%

1 week a year is 2%

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the-job training in this information.

- | | | |
|--|--|--|
| <input type="checkbox"/> Up to High School or equivalent | <input type="checkbox"/> 1 year certificate or equivalent | <input checked="" type="checkbox"/> 2 year diploma or equivalent |
| <input type="checkbox"/> Trade certification or equivalent | <input type="checkbox"/> 3 year diploma / degree or equivalent | <input type="checkbox"/> 3 year diploma / degree plus professional certification or equivalent |
| <input type="checkbox"/> 4 year degree or equivalent | <input type="checkbox"/> Post graduate degree (e.g. Masters) or equivalent | <input type="checkbox"/> Doctoral degree or equivalent |

Field(s) of Study:

Business/Secretarial studies or Office Administration

B. Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

- No additional requirements
- Additional requirements obtained by course(s) of a total of 100 hours or less
- Additional requirements obtained by course(s) of a total between 101 and 520 hours
- Additional requirements obtained by course(s) of a total of more than 520 hours

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or on-the-job training occurs after the conclusion of the educational course or program.

- Less than one (1) year
- Minimum of one (1) year
- Minimum of two (2) years
- Minimum of three (3) years
- Minimum of five (5) years
- Minimum of eight (8) years

	experience gained as a team player in a service oriented office environment using a variety of computer software packages such as word processing, spreadsheets, business presentations preferably in an educational setting

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

	#1 regular & recurring
Key issue or problem encountered.	In trying to arrange an urgent meeting with the Executive Director, Vice President and others, the incumbent learns that a key participant will be away from the College for several weeks.
How is it identified?	The initial request to set-up the meeting comes from the Executive Director. Upon contacting the meeting participants to get availability, the incumbent finds out that a key participant will not be available for several weeks and has limited availability prior to this.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent explores/verifies with the Executive Director a variety of options, such as whether the meeting needs to take place before the participant goes on vacation, or can it take place via teleconferencing, etc.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent, using own knowledge of the office operations and by asking questions of the Executive Director, must make sure he/she understands the urgency of the matter so that he/she can communicate it appropriately to the other participants.
What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).	Knowledge of the participants' schedules, existing meetings in the Executive Director's schedule that could be re-arranged and alternatives (eg. teleconferencing) that could be used.

3. Analysis and Problem Solving

#2 regular & recurring

Key issue or problem encountered	Information provided to the incumbent for payroll/human resources forms is incomplete or inaccurate.
How is it identified?	The problem could be identified a number of ways depending upon the situation, such as the incumbent (based on past practice or own knowledge) identifies that the originator has requested the wrong process to be used, or the computer program rejects data that has been entered.
Is further investigation required to define the situation and/or problem? If so, describe.	Problem is normally resolved when incumbent contacts the originator.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	If incorrect information had been provided, the incumbent would contact the person for the right information. If the wrong form had been requested and the incumbent knew what the standard process was (eg. part-time payroll sheet was submitted without the pre-hire forms), then the incumbent would initiate the correct paper work and inform the originator.
What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).	Past practices and previous experience would assist along with policies and procedures provided by payroll and human resources.

#1 occasional

Key issue or problem encountered	Space previously booked for a Committee meeting has been double booked.
How is it identified?	When the incumbent arrives at the room to set-up for the meeting, he/she finds other people using the space.
Is further investigation required to define the situation and/or problem? If so, describe.	The incumbent confirms that the other people have the right location (versus the wrong room). Contacts the scheduler to determine what happened and find-out if alternative space is available.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent seeks answers to standard questions to find a possible solution, such as Can another meeting space be located? Is it appropriate? How to notify participants about the change of venue? Do others need to be notified, for example catering, technology, etc?

What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).

Past practice/experience - has this happened before? how was the situation resolved. Discussion with the Office Manager about the best way to proceed.

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

Using the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

	#1 regular & recurring
List the project and the role of the incumbent in this activity.	Budget preparatory work. The incumbent ensures he/she gets data from the reporting sections/departments, inputs preliminary figures onto spreadsheets and maintains back-up documentation.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	<ul style="list-style-type: none"> - incumbent must set-up a "paper trail" to ensure that all expenditures are properly accounted for and that the correct accounts are used. - the incumbent must organize own work schedule to ensure the information is received from other sections, verified and entered so that deadlines are met.
List the types of resources required to complete this task, project or activity.	<ul style="list-style-type: none"> - previous budget spreadsheets, current manual filing systems and office procedure manuals are used to provide assistance
How is/are deadline(s) determined?	<ul style="list-style-type: none"> - budget deadlines are normally established either by the Finance Office or Senior Management
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	<ul style="list-style-type: none"> - if the Finance Office changes the process or requires new or different information, the incumbent will adjust his/her work schedule to accommodate the change. Deadline or work schedule conflicts would be reported to the supervisor for resolution.

4. Planning/Coordinating

#2 regular & recurring

List the project and the role of the incumbent in this activity.

Maintain appropriate level of supplies for office use. The incumbent must monitor supplies and adjust minimum levels or supplier as appropriate.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

- based on usage the incumbent determines when supplies should be refreshed
- incumbent must track usage
- amounts are tracked so that budget amounts are not exceeded

List the types of resources required to complete this task, project or activity.

- past usage information, office procedure manuals and online ordering procedures are available to provide assistance

How is/are deadline(s) determined?

- based on past practice, the reordering of supplies occurs bi-weekly basis; the incumbent would determine if a "rush" order was required or whether the supplies would last to the normal reorder date

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

- Finance office may determine if an alternative supplier (eg. photocopier paper) was to be used
- the incumbent would determine if there was any advantage to bulk purchasing or less expensive supplier (if appropriate)

#3 regular & recurring

List the project and the role of the incumbent in this activity.

Support to a variety of Committees. The incumbent provides "secretarial" support to several departmental committees.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

- the incumbent must ensure that participants are made aware of the meeting schedule, previous meeting notes are distributed, follow-up activities, etc

List the types of resources required to complete this task, project or activity.

- after each meeting, the incumbent must list the follow-up activities and determine which activities require his/her attention
- other follow-up activities are provided to the Executive Director so that they can be assigned to other staff
- the incumbent is made aware of the deadlines for these other projects so that he/she can bring the issue forward for the Committee's determination

How is/are deadline(s) determined?

- a pre-determined meeting schedule is developed in consultation with the Executive Director based on previous years' schedules
- within these deadlines, the incumbent must organize own work to ensure that all meeting notes and corresponding documents are sent out to members in a timely fashion

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

- changes to meeting schedule would be initiated by the Executive Director
- the incumbent would be responsible for communicating these changes to the committee members

5. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus on the actions taken (rather than the communication skills) that directly assist others in the performance of their work or skill development.

Though Support Staff cannot formally "supervise" others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
<input checked="" type="checkbox"/>		Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	- as the first contact for the office, the incumbent answers general questions from others about enrolment service procedures
<input type="checkbox"/>	<input checked="" type="checkbox"/>	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	- in the absence of the Office Manager, the incumbent assists other staff in the department with any questions or concerns that arise and shows the person how to complete the tasks correctly
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?

Regular and Recurring

Day-to-day activities are performed independently following past practices and established office routine or process. Assignments from others, such as preparation of a letter or report, would be explained at the beginning of the assignment by the originator.

What rules, procedures, past practices or guidelines are available to guide the incumbent?

Regular and Recurring

- past practices or experience
- department policies concerning enrolment services
- procedure manuals for a variety of software packages or IT help desk
- operation/procedure manuals from other departments such as payroll, HR, finance
- Committee books

How is work reviewed or verified (e.g. feedback from others, work processes, Supervisor)?

Regular and Recurring

- work requested by others (such as production of reports, minutes of meetings, etc) are reviewed upon completion by the originator
- the incumbent is expected to proof own work before passing onto the originator
- many processes have built-in checks, such as supplies inventory, data for HR and payroll

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?

Regular and Recurring

- if a meeting space is double booked and alternative space can't be located, the incumbent would discuss with the Office Manager to see if other alternatives can be explored (eg. cancel meeting, move to offsite location, etc)
- adjustments to travel arrangements made for the Executive Director (that don't affect the time schedule) would be discussed with the travel agency
- if the incumbent was unsure of a internal process to be followed, he/she would check with that department or its guidelines before proceeding
- situations not previously encountered by the incumbent would be discussed with the Officer Manager

Describe the type of decisions that would be decided in consultation with the Supervisor.

Regular and Recurring

- conflicts in work priorities
- recommendations to change a supplies vendor
- situations not previously encountered by the incumbent nor the Office Manager
- follow-up items from Committee work that were assigned to others and not completed within the deadline

Describe the type of decisions that would be decided by the incumbent.

Regular and Recurring

- selecting the right software package to produce written material (eg. determines whether a spreadsheet format is more effective than word processing)
- selecting the correct payroll and HR forms and entering the appropriate information
- whether a student complaint requires the attention of the Executive Director or can be handled by someone else and the Executive Director informed

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree in which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D, W, M, I)*
How is it received?	How is it carried out?		
Front-line contact person for the Office of the Executive Director; therefore all inquiries are initially handled by the incumbent	<ul style="list-style-type: none"> - the majority of service requests are straightforward with an established process on how to proceed (eg. how do I do something) - if the incumbent can't answer the question, then he/she will ask questions of the clients in order to determine who the inquiry should be forwarded to 	students, parents, public, faculty	D
Requests to make meeting and/or travel arrangements are usually received verbally or by email; specific details (eg. dates, times and participants would be provided by the Executive Director)	<ul style="list-style-type: none"> - based on office procedures and past practice, the incumbent would make the appropriate arrangements for the meeting or travel. 	Executive Director	W
Follow-up issues arising from committee meetings are raised by the committee members outlining the task that needs to be done	The incumbent will follow the instructions provided by the committee and ensure that it is completed within the deadline established	various college committees	W

* D = Daily W = Weekly M = Monthly I = Infrequently

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M, I)*
Exchanging routine information, extending common courtesy	<ul style="list-style-type: none"> - providing information on the services provided by the Office of the Executive Director - providing information (such as payroll forms, attendance reports, etc) - arranging meetings 	<ul style="list-style-type: none"> - parents, students - payroll, HR - secretaries in other departments or committee members 	<ul style="list-style-type: none"> D M W
Explanation and interpretation of information or ideas	<ul style="list-style-type: none"> - making travel arrangements for the Executive Director, which are not straightforward - developing written materials for presentations or communiques - explaining office procedures during Office Manager's absence 	<ul style="list-style-type: none"> - travel agent - department staff - department staff 	<ul style="list-style-type: none"> I M I
Imparting technical information and advice			
Instructing or training			
Obtaining cooperation or consent			
Negotiating			

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9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1 - 2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
sitting	D			✓	✓		
lifting/carrying (light weight)	W	✓			✓		
lifting/carrying (med weight)	I	✓			✓		

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If lifting is required, please indicate the weights below and provide examples.

- Light (up to 5 kg or 11 lbs)
- Medium (between 5 to 20 kg or 11 to 44 lbs)
- Heavy (over 20 kg or 44 lbs)

equipment for committee meetings, notebook, projector, etc
presentation materials for committee meetings such as flip charts

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform a task and the duration of the task, including breaks (e.g. up to 2 hours at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (e.g. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Transcribing or taking minutes of meeting where the topic being discussed is either highly sensitive or outside the incumbent's experience or familiarization	W	✓		
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input checked="" type="checkbox"/> Usually (unless discussions become "heated" and speakers do not respect when others are speaking) <input type="checkbox"/> No				

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Preparing budget preparatory work for both monthly reconciliation and year end planning and forecasting	M		✓	
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input type="checkbox"/> Usually <input checked="" type="checkbox"/> No telephone inquiries, drop-in visits from students and staff				

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input type="checkbox"/> Usually <input type="checkbox"/> No				

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11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Condition	Example	Frequency (D, W, M, I)*
<input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)	normal office environment	D
<input type="checkbox"/> accessing crawl spaces/confined spaces		
<input type="checkbox"/> dealing with abusive people		
<input type="checkbox"/> dealing with abusive people who pose a threat of physical harm		
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to extreme weather conditions		
<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
<input type="checkbox"/> smelly, dirty or noisy environments		
<input checked="" type="checkbox"/> travel	to other campuses for Committee meetings (normally 20-30 minutes away) to drop off urgent/sensitive matters to external agencies	M I
<input type="checkbox"/> working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

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