



SAMPLE BUSINESS CASE TEMPLATE TO COUNCIL FOR HIRING AN EXECUTIVE ASSISTANT

Subject:

Proposal to hire a full time / permanent Executive Assistant, at the City/Region/County of XXX. This position will report directly to the Chief Administrative Officer / CAO and provides support in such a manner to both Mayor and/or Councillors when/where applicable in order to allow the CAO to focus more on Council's strategic priorities.

Recommendation / Requirements:

THE RECOMMENDATION IS TO HIRE AN EXECUTIVE ASSISTANT WHO WILL PROVIDE VITAL SUPPORT AND RELIEF TO SENIOR EXECUTIVES, AFFORDING THEM THE TIME TO FOCUS ON CITY/REGION/COUNTY RELATED BUSINESS MATTERS.

Post Secondary Education in Office Administration or equivalent; a minimum three to five years working in an executive or senior administrative role. Excellent Office Management Skills, including calendar management, time management skills, the ability to meet critical and irregular deadlines. A strong decision-making and proactive approach to problem solving would be an asset along with an advanced level of proficiency in Microsoft Suite applications, WebEx/ZOOM/Microsoft Teams.

Experience in a municipal government setting would assist the CAO / Mayor / Councillors Office(s) and an acceptable combination of education and experience.

Executive Summary:

The successful Executive Assistant would handle work of a highly confidential nature, perform proactive administrative, secretarial, and clerical support. Perform executive functions for the Office of the CAO and/or the Office of the Mayor and City Councillor(s) in order to ensure a coordinated and cohesive approach to administrative matters related to the role and functions of the CAO and/or Mayor/Councillors offices.

Background (Mandatory)

This position would report directly to the Chief Administrative Officer / CAO and would be responsible for the effective and efficient administration of day-to-day operations in the Office of the Mayor and Chief Administrative Officer.

The incumbent must possess a broad knowledge of municipal government, and the ability to apply this knowledge to promote an effective and organized office. This position involves considerable contact with municipal, provincial, and federal staff, elected officials, and the general public. Must be able to work within strict time constraints and manage multiple and changing priorities in a flexible yet demanding working environment. The position requires a person with confidential tact, political acumen, and exceptional work ethic.

Present Status (Optional):

City / Region/ County to insert current status.

Comments (Mandatory):

Assisting the CAO and/or Mayor/Councillors Offices with daily administrative duties and completing a broad variety of administrative tasks including, managing calendar(s), preparing for internal/external meetings (which includes events/presentations), arranging travel, preparing/editing correspondence(s), as they relate to the CAO Office(s). Communicating with staff of CAO/Mayor/Councillors matters and acting as a liaison between the public and community organizations.

The Executive Assistant would alleviate the day-to-day administration duties from the CAO; therefore, the CAO could focus on City/County matters.

Core Competencies:

- Acting with Integrity
- Driving Continuous Improvement
- Communicating Effectively
- Serving Customers
- Ability to be flexible, work collaboratively, independently, be organized, influential, connect with people, analytical and demonstrate sound judgement.

Tech Trends:

- Flexibility to incorporate new technology tools required
- Regular professional development with emphasis on technology
- Strong organizational and planning skills incorporating current office technology

Other

- Organizational skills
- Initiative
- Attention to detail
- Adaptability: manage internal/external relationships, resolve conflict, connect employees, learn new technology, train others on new equipment and technology
- Flexibility: ability and desire to work beyond their job description
- Deliver customer service to internal/external partners/customers – representative of the CAO and/or Mayor/Councillors offices

The work performed requires the ability to work independently, and exercise considerable tact, judgment, and initiative. Routinely researches material for the Office of CAO. Compiles information and prepares remarks/briefing notes required for the CAO's use at speaking engagements, conferences, and presentations.

The Executive Assistant could assist and review various Council and Committee Agendas, minutes, correspondence, media releases and publications to maintain knowledge and information on current issues to highlight for the CAO. Plan and prepare information for meetings involving the Mayor and Members of Council, including collecting/assembling background material, agendas, minutes, presentation items and other special requirements as necessary.

Prioritize the Office of the CAO's workload and prepare schedules/itineraries including processing all incoming invitations and schedule their participation in special events with the respective organizations.

The Executive Assistant would represent, interact, and maintain effective working relations with the public, members of City Council, provincial and federal politicians, the media, senior management, and a number of City employees on a daily basis by telephone, in person, or electronically. The ability to recognize and respect the importance of confidentiality, and routinely exercise discretion, tact, and courtesy to those in contact with the Office of the Mayor and City Administrator is essential.

Options (Optional):

- Assists the CAO with research and suggestions for improvements to the organization by taking on these duties to afford senior executives sufficient time to focus on high level business matters.
- Monitoring of the annual budget for the CAO's Office budget. Responsible for expenditures for the Office of the CAO.
- Wherever possible, respond to general inquiries to conserve the CAO's time.
- Coordinate activities on behalf of the CAO and/or Mayor/Councillors offices (i.e., events, civic receptions).
- Support the CAO and/or Mayor/Councillors offices with such duties as:
 - Assist in the preparation/scheduling of various appointments/meetings for CAO and/or Mayor/Councillors Office(s) by contacting participants by telephone, letter, or e-mail, and in turn, providing necessary background information, arranging catering, booking meeting rooms, and other duties of similar nature.
 - Arrange travel and accommodations for CAO.
 - Maintain weekly attendance/payroll for the Office of the CAO.
 - Respond to and/or forward e-mail inquiries.
 - Arrange and prepare Agendas for meetings.
 - Perform other secretarial and clerical functions as directed by the CAO Office (i.e., grievances, personnel issues, etc.)
 - Ability to use sound judgement, always maintain discretion and confidentiality and ability to manage multiple priorities from different sources.

Strategic Plan (Optional)

Engagement and Consultation (Optional)

- Reviewed CAMA Toolkit, this resource will provide guidance for newly hired and or experienced Executive Assistant. In addition, the toolkit provides further assistance for the CAO embarking on the hiring of an Executive Assistant.
- Reviewed Executive Summary of CAMA Survey Results (both CAO and EA), this report presents the detailed findings of the survey which was circulated in September 2022 to the CAMA membership and forwarded to their EA's.
- Feedback/Research gathered data from across present status with other Cities / Counties within Canada is recommended.

Financial Impact (Mandatory)

City / Region/ County to insert:

- Rate/Salary Type Salary
- Grade Level
- Rate/Salary Details

Conclusion (Mandatory)

The Executive Assistant would work in an office environment and participate as a “team member” in the CAO and/or Mayor/Councillors offices. Required to exercise discretion when dealing with sensitive and confidential information, and to always maintain confidentiality and practice political acumen.

The CAO’s Office that has the support of a professional Executive Assistant will have the reassurance and satisfaction that their offices are being managed with day-to-day administrative duties providing reassurance in order for the CAO and/or Mayor/Councillors offices to focus on Council’s strategic priorities.

Attachments (Optional)

Appendix 1 / Sample CAMA Executive Assistant Job Posting / see Toolkit