



TOOLKIT

**FOR THE EFFECTIVE EXECUTIVE
ASSISTANT TO THE CHIEF
ADMINISTRATIVE OFFICER**

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TOOLKIT
FOR THE EFFECTIVE
EXECUTIVE ASSISTANT TO
THE CHIEF ADMINISTRATIVE
OFFICER

CITY HALL
HÔTEL DE VILLE

Introduction

Today's office is almost unrecognizable compared to twenty or thirty years ago. But what many fail to recognize is that the role of the Executive Assistant has developed substantially over that period. No day is the same. No hour is the same. Not even the boss' moods are ever the same! The expectations of the modern-day Executive Assistant are higher and more stressful than ever before. They need to be everything to everyone, all the time – and all with a smile!

Being an Executive Assistant to the Chief Administrative Officer is a unique position that requires a variety of skills, including political acumen. Whether you are updating schedules, making travel arrangements, taking minutes, or writing a report, it all must be done with a high degree of confidentiality. You are essentially the "gatekeeper" of all people and all things.

Being an Executive Assistant is also a leadership role in your organization and your community, and every day you stand up and take the lead when a situation requires it. How can you perform your role with confidence and overcome various barriers? You spend all day helping others, but who is going to help you?



Having appreciation for the role of the Executive Assistant in local government, the Board of the Canadian Association of Municipal Administrators (CAMA) formed a committee to recognize the importance of this position and highlight it across the country.

The **Toolkit for Effective Executive Assistants to the Chief Administrative Officer** is the result of the efforts of this Committee. It will help you, the Executive Assistant, gain a new perspective on your role and highlight the many benefits that you bring to the Chief Administrative Officer, the organization, and the community. It will provide you with an introduction to local government and the various roles and responsibilities of those positions, provide insight into your role as the Executive Assistant, offer tips on the many office and leadership skills that you practice every day, provide political acumen tools, as well as best practices on building relationships and networking, exercising self-care, and how to adapt to new leadership – just to name a few. You will also be interested in reading “words of wisdom” from your colleagues across the country, along with some case studies of real-life scenarios, downloadable resources, and links to additional materials that will support you in your career.

It wouldn't have been possible to create the Toolkit without the support of our CAMA members (CAOs and their direct reports) and you, their Executive Assistants, who completed our survey. You will see many of your responses throughout the Toolkit which provide a Canadian perspective on the Executive Assistant to the CAO role.

“My favourite part of my job is that I can make it my own. I am confident in my skills and what I bring to the table each day, and I feel this job allows me to mold the position and raise the bar to the level I feel it should be.”

-Executive Assistant

Who is This Toolkit For?

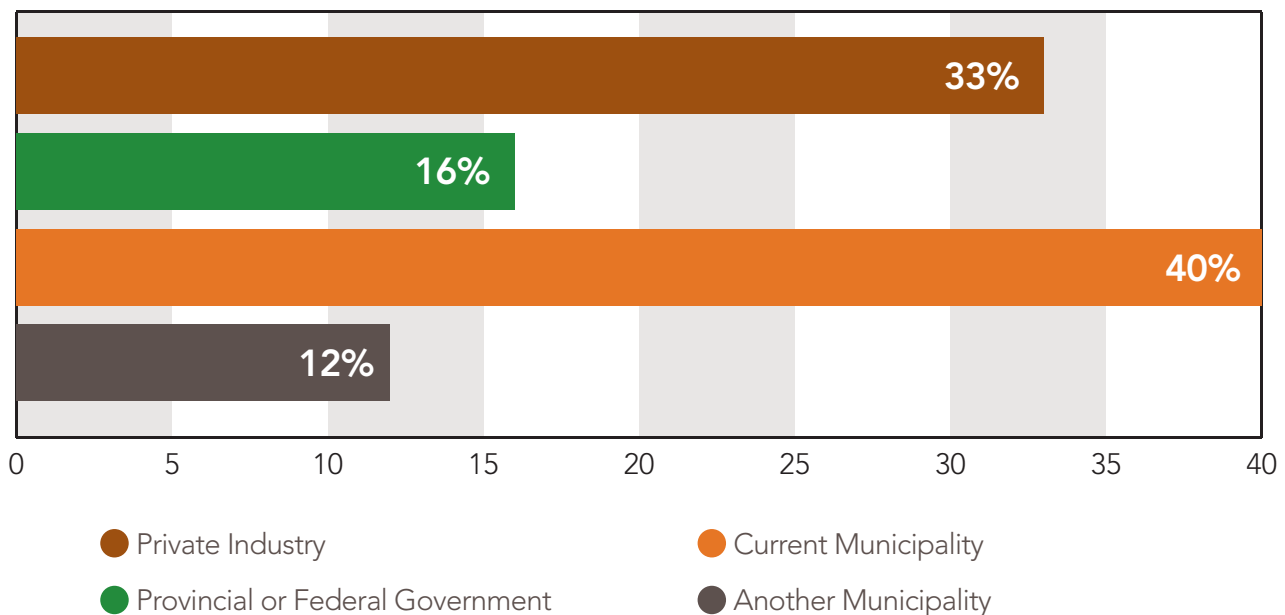
The primary audience of this Toolkit is the **Executive Assistant to the Chief Administrative Officer in local government, which includes existing Executive Assistants with experience in the role, as well as new Executive Assistants.** Some Executive Assistants enter the municipal world from the private sector, so this resource is also for the individual that has minimal local government experience.

Forty percent (40%) of the survey respondents indicated that they worked in their current municipality prior to being hired as the Executive Assistant to the CAO (or direct report to the CAO), 33% worked in the private industry, 16% were employed with the provincial or federal government, and 12% came from another municipality.

This Toolkit also provides the Chief Administrative Officer with some guidance on ways to build a partnership with their Executive Assistant. The topics in the CAO Chapter include the hiring process (with a sample job description, posting, and interview questions), a business case to Council if they don't currently have a staff member in this position, finding the right personality and fit, and some tips on communication, performance evaluations, and delegation.

The more effective the Executive Assistant, the more effective the CAO...and the more effective the organization, Council, and the community. This resource will assist Executive Assistants and CAOs to build stronger working relationships based on increased trust and improved communication.

Q8 Prior to your current job as Executive Assistant where did you work?



About This Toolkit

The **Toolkit for the Effective Executive Assistant to the Chief Administrative Officer** was developed by the following Committee of Executive Assistants of CAMA members across the country, led by CAMA Executive Director, Jennifer Goodine (former Office Administrator to the CAO and Mayor, City of Fredericton, NB):

- Cassandra Rutland, Executive Assistant to the Chief Financial Officer and Commissioner of Corporate Services, Region of Peel, ON
- Beth Readman, Executive Assistant to the CAO & Administration, County of Lennox and Addington, ON
- Victoria Bowering, Executive Assistant to the CAO's Office, City of Nanaimo, BC
- Elizabeth Grenon, Executive Assistant, City of Dawson, YT
- Jacque Thrower, Executive Assistant, Township of West Lincoln, ON
- Roxana Dima, Executive Assistant to the City Manager, City of Dollard-des-Ormeaux, QC
- Safiya Khan, Business Analyst, City of Mississauga, ON
- Tracy Hart, Executive Assistant, Office of the CAO, Town of Truro, NS
- Denise Habibovic, Retired Executive Assistant to the Chief Financial Officer and Commissioner of Corporate Services, City of Mississauga, ON

Each member of this team is currently an Executive Assistant or has been in your shoes as an Executive Assistant, and have brought their firsthand experiences in local government, specifically to the CAO and other Directors, to the development of this guide. The authors made every effort to reflect the nuances of different geographic locations and populations across the country, with several skills highlighted as being transferable to any Executive Assistant. It is important that you do your local research to understand the norms for your community or region. The Toolkit does not cover every potential situation that you may face as an Executive Assistant to the CAO, but it offers helpful advice that may assist you and your community.

If you would like to network with other Executive Assistants across the country, please contact the [CAMA National Office](#) and they can connect you.

To facilitate the ease of finding information, this guide has been divided into sub-topics to allow you to navigate to the material you need with an interactive Table of Contents with links to other resources throughout the document.

CAMA also has various toolkits that you will see highlighted throughout this guide (and in a separate chapter). You may wish to add them to your library to learn more about the CAO profession and local government, and to remind your boss that these resources are available to him/her and your municipality.

The following toolkits can be found on CAMA's public [website](#):

- [CAO Performance Evaluation Toolkit](#)
- [Political Acumen Toolkit](#)
- [Council Orientation Toolkit](#)

As well, additional toolkits are in the [CAMA Member's Section](#) which you can access using your boss' password if he/she is a CAMA member:

- [CAO Employment Contract Toolkit](#)
- [Human Resources Toolkit](#)
- [A Toolkit for the Effective CAO: The Right Questions to Ask](#)
- [Members in Transition Toolkit](#)
- [Leadership Guide to Effective CAO-Council Relations](#)

We encourage you to use this Toolkit as a guide and take this information and make it your own. Every Executive Assistant to the CAO position is different within each municipality; but this Toolkit will certainly help you along the way with your own hard work and dedication.

Terms

Chief Administrative Officer/CAO - Throughout the document we will be using the term CAO, however this could be transferable to City Manager, and often to senior administrators. The CAO is also referred to as "the boss".

Mayor - Could also refer to Warden, Reeve, or Head of Council.

Executive Assistant to the CAO - This could also mean an Executive Assistant to a Director, but for the purpose of this document the context will be to the CAO.

Municipality - Could also refer to a town, village, county, district, community.



**EXECUTIVE
ASSISTANT
AUDIENCE**

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Introduction to Local Government

Levels of Government in Canada

Federal, Provincial and Territorial, and Municipal

In Canada, there are three levels of government: Federal, Provincial and Territorial, and Municipal. The "Library of the Canadian Parliament" (<https://lop.parl.ca>) states that "the federal government creates laws and manages programs and services that tend to affect the whole country, the provincial and territorial governments have powers to make decisions relating to areas of law that affect their province and territory directly, and the municipal governments are responsible for establishing by-laws and services that are administered in a specific city, town or village."

What are the Different Levels of Government Responsible For?

*Please note that below are examples of services for each level of government, however things in your Province/Territory may differ based on jurisdictional responsibilities.

Municipal Government	Provincial/ Territorial Government	Federal Government
<p>Municipal Level (or local government) is usually based in a city, town or district. Municipal governments deliver many of the services people use in their daily lives - it is the government closest to the people.</p>	<p>In each of the ten Provinces in Canada, the provincial government is responsible for areas listed in the <i>Constitution Act, 1867</i>, such as education, health care, some natural resources, and road regulations. Sometimes they are a shared responsibility with the federal government.</p> <p>It is also important to note that the three Territories in Canada (Northwest Territories, Yukon Territory, and Nunavut) have their own governments and are granted their powers through federal legislation instead of through the Canadian constitution.</p>	<p>The Federal government's responsibilities generally affect the entire country.</p>

Responsibilities - Municipal Government	Responsibilities - Provincial/Territorial Government	Responsibilities - Federal Government
<ul style="list-style-type: none"> • Agricultural Services • Libraries • Building Permits and Zoning • Recreation, Parks and Playgrounds • Arts and Culture • Water and Sewer Services • Police Services • Fire Services • By-law Enforcement • Roads and Sidewalks • Parking • Licensing and Animal Control • Public Transportation • Planning and Development • Economic Development • Collection of Garbage and Recycling • Property Taxes (municipal portion) • Social Services • Long Term Care 	<ul style="list-style-type: none"> • Highways • Education • Healthcare • Social Services • Tourism (Provincial) • Environment • Agriculture • Provincial Governance and Administration which includes the legislature, provincial treasury, and local government • Provincial Taxes • Property Taxes (provincial portion) • Marriage • Provincial Courts and Prisons 	<ul style="list-style-type: none"> • Post Office • Border Services, Immigration and Citizenship • Foreign Affairs and Policy • RCMP and Military • Income Taxes and Employment Insurance • Social Security • Industrial Relations • International Trade • Banking, Trade and Commerce • National Defense • Employment Insurance • Federal Taxes • Correctional Facilities and Supreme Court

First Nations Councils and Communities

Some CAO's work with First Nations communities and their Chiefs and Administrators. First Nations communities are administered like a municipality with the same infrastructure needs but they also deal with other cultural, legal, and jurisdictional matters.

The governance of a First Nations community is overseen by a Chief and a Council with elections taking place like those in a municipality. The Council makes all the policy decisions and are responsible for the governance and administration of affairs, including education, housing, water and sewer, roads, and other community businesses and services.

Some First Nations governments, specifically in the Territories, have agreements with territorial, federal, and municipal governments regarding land development, water and sewer, infrastructure, legislation, etc. They are more like a Territorial Government than a municipal government. They pass law which is considered an Act, like the Territorial Government laws, not like a municipal by-law.

Roles and Responsibilities of Local Government

The management of municipal government is by elected officials and staff. The principal role of the elected officials is to govern, while the principal role of staff is to manage and implement.

Council

The Council of your municipality is comprised of members who have been elected by your citizens. They may be elected by Ward (divided by districts) or at large (across the entire municipality) depending on the system your local area and Province/Territory utilizes.

The primary role of a Council member is that of **governance**. Council sets the strategic direction of your community and is responsible for the oversight and guidance of the entire organization. It is important to note that individual Councillors do not have decision making authority. All powers of a municipality are made by Council as a whole and each Councillor has one vote. Even though some Councillors have been elected for specific areas of the community and their role is to voice the concerns of the residents they service, they govern strategically for the entire municipality.

Some of the major responsibilities of the Council as a whole are articulating the long-term vision of the community, including establishing and enforcing by-laws, adopting a strategic plan, setting overall service levels and programs that are delivered to citizens, leading land use planning, encouraging growth and sustainability, approving operating and capital budgets, and setting property tax rates - just to name a few.

Mayor/Warden/Reeve (Head of Council)

A Mayor is elected at large by all voters in a municipality and acts as the chair at Council meetings. It is their job to ensure that meetings run smoothly and that the Agenda is followed. The Mayor is also the "public face" of the municipality, which includes meeting with other levels of government, businesses, attending events and ceremonies and other community events. They act as the public spokesperson in the media unless this duty is delegated to another member of Council.

A Warden or Reeve is similar to a Mayor, but is elected to the position by their fellow Councillors instead of directly by the voters. The Warden or Reeve has all of the same powers as the Mayor. This position is most often found in rural municipalities, counties and townships, and the term is determined by the individual municipality.

Case Study: How to Deal With Mayors of Varying Leadership Styles

I have worked under two Mayors that had very different political leadership styles, levels of experience, and personalities.

One Mayor I considered to be an experienced Mayor who possessed all the attributes of a good leader, with excellent communication skills, tact, diplomacy, and most importantly trusted staff to get the job done. I always say, "anyone can manage but not everyone can lead". Dealing with this type of leader can make your and the CAO's job easier.

Dealing with an inexperienced Mayor can sometimes be more work, and may take more time to adjust, especially if you are new to the Executive Assistant position. Sometimes they can micromanage, communicate inappropriately with the public and employees, and don't trust staff and their abilities and expertise.

Here are some tips to consider when you work with an inexperienced Mayor:

- Have confidence in yourself and your abilities;
- Try not to take things personally;
- Take responsibility when necessary;
- Be respectful and professional;
- Practice active listening;
- Choose your words carefully;
- Show empathy;
- Anticipate expectations when possible; and
- Try to understand their communication style.

Having a "strong" CAO can be an excellent asset in dealing with an inexperienced Mayor.

Submitted by an Executive Assistant

Chief Administrative Officer

Most municipalities employ a Chief Administrative Officer who is the most senior municipal official and the only direct employee of Council - which means that the CAO has multiple bosses (Council). The CAO is responsible for the management of staff and the day-to-day operations that are driven by the strategic direction and policy set by Council. Hiring a qualified CAO is one of the most important decisions a Council can make. Some smaller communities do not use a CAO as their primary administrator but rather a Clerk/Treasurer acts as the main administrator. The CAO acts as chief advisor to Council by providing essential information to assist in making effective policy decisions. This individual must have excellent political acuity and be highly adaptable, especially when elections are held and Councils change.

It is important to note that the CAO is the **only employee to directly communicate and take instruction from Council**. It is inappropriate for Council members to direct municipal staff. Any concerns regarding staff should be communicated directly to the CAO.

Case Study: How Does the Executive Assistant Tell the CAO that the Mayor and/or Council are not Staying in Their Lane and are Getting Into Operations?

In my opinion, I don't think some Council members clearly understand their roles.

Maybe I have been in this role too long, but I have absolutely no issue with informing the CAO of the Mayor or a Council member placing themselves in operations. Having an open and trusting relationship with the CAO is paramount here. I see my role as ensuring the CAO isn't taken by surprise and blindsided, so I always ensure that the CAO is informed of such issues.

There have been times where Council members have contacted staff directly even though they are to only contact the CAO, being their only employee. Staff have dropped what they were doing to address the Council member's concern which interferes with daily operations.

There have been times that I have directly informed Council members that their request is operational in nature and not within Council's authority. This assertiveness and diplomacy take time to develop as you gain confidence in your role.

Submitted by an Executive Assistant

Municipal Departments

The organizational structure for each community will differ depending on the size and their responsibilities, however, below is a list of the most common departments of a municipality. CAMA developed a "[Toolkit for Effective CAOs - The Right Questions to Ask](#)" and included are some sample questions to ask to learn about each Division and Department of the City:

- Information Technology
- Financial Services/Treasury
- Human Resources
- Compensation and Benefits
- Office of the City Solicitor/Legal
- Office of the City Clerk
- 311/Service Centre
- Corporate Communications
- Planning and Development
- Building Inspection
- Building Services
- Fleet
- Engineering Services
- Parks and Trees
- Water and Sewer
- Roadway Operations
- Transit
- Parking Services
- Recreation, Culture and Community Development
- Tourism
- Fire
- Public Safety Communications/Dispatch Services
- By-law Enforcement
- Police
- Social Services
- Long Term Care
- Library Services

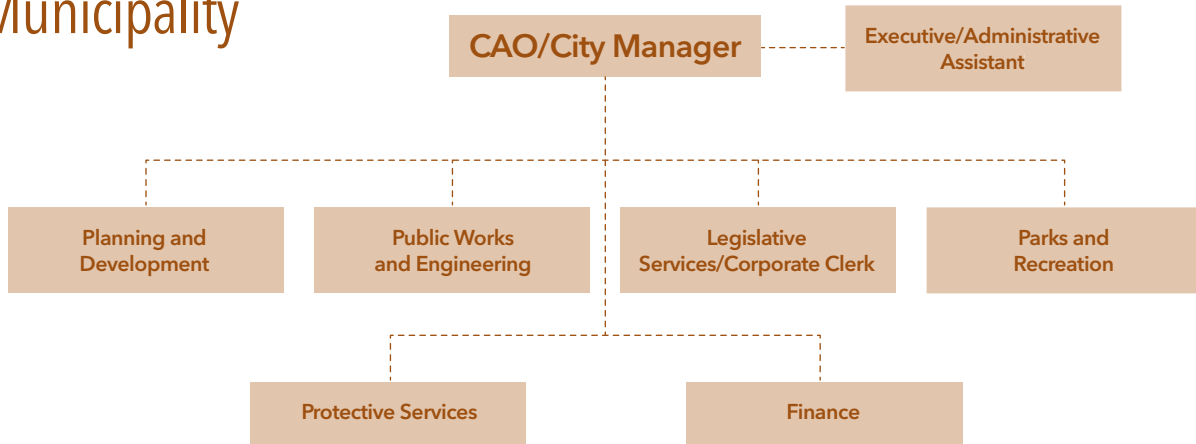
The Role of Municipal Staff

Each municipality will have a different organizational structure with Directors/Commissioners reporting directly to the CAO, and other managers, supervisors and staff reporting to them.

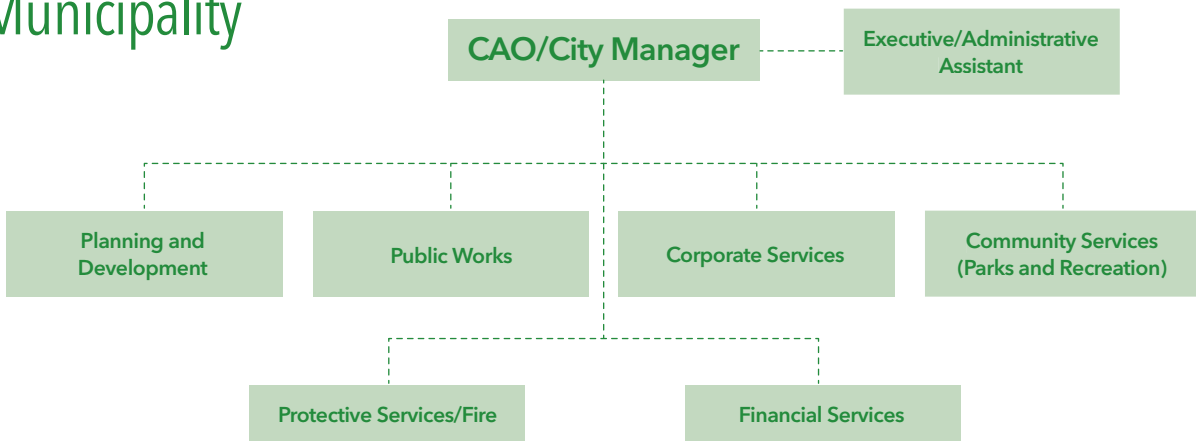
Each role is equally important, as each staff member is responsible for services that aim to make our cities, towns and rural areas prosperous and healthy places to live and work.

Below are some sample organizational charts to provide you with an example of the hierarchy in different size municipalities:

Extra Small Municipality



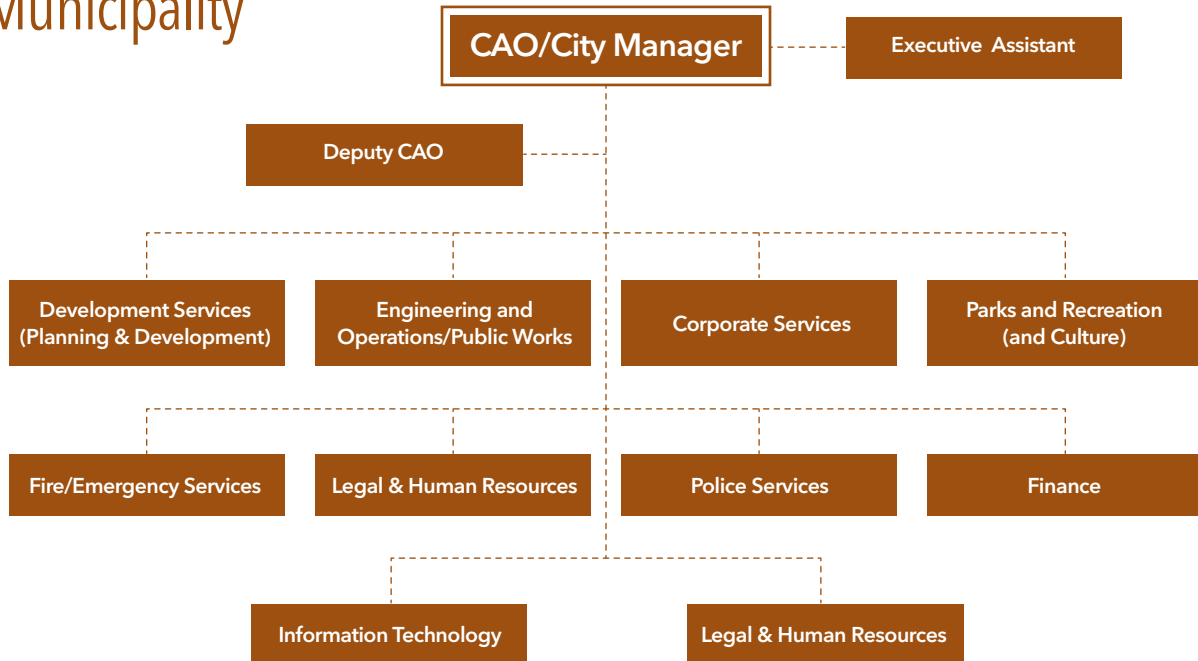
Small Municipality



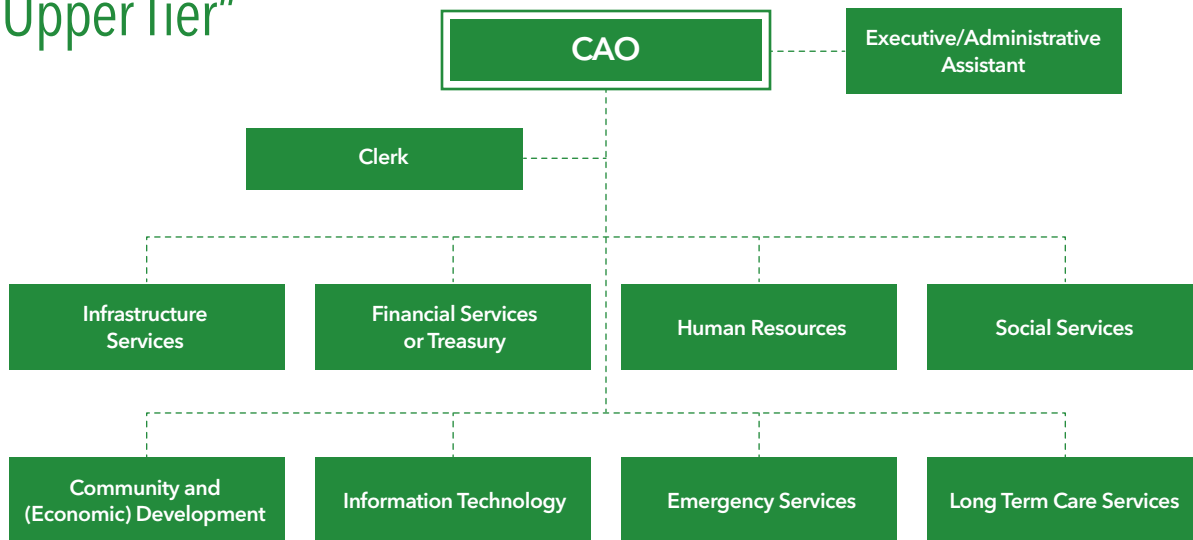
Medium Municipality



Large Municipality



County - "Upper Tier"



Region - "Lower Tier"





The Role of Citizens

Improving the quality of life of its citizens is at the heart of all communities. Citizens want to engage with their local government. They want to be able to share their views (positive or negative) and access channels to participate in the decision-making process of government, connect with their elected officials, and be assured that their input has been heard. Municipalities strive to improve their transparency and communication to simplify how they interact with citizens. Simply put, the citizens are our bosses and will give us their opinions whether we ask them or not.

Policy and Strategic Direction Versus Day-to-Day Operations

As noted above, **Council governs while staff manages**. Council must collectively hold the CAO accountable for the effective management and implementation of the strategic direction of the municipality, while staying out of running the operations. This can be challenging for the elected officials when they are faced with complaints from citizens. See [CAMA's Leadership Guide to Effective CAO-Council Relations](#).

Role of the Executive Assistant to the Chief Administrative Officer

Reporting directly to the Chief Administrative Officer, the Executive Assistant is a self-motivated and independent individual who performs senior level administrative support in a one-on-one working relationship with the CAO. Sometimes the Executive Assistant to the CAO also supports the Mayor and Council, along with the Deputy Chief Administrative Officer and any other employees that fall under the CAO's office.

Working in a sensitive and confidential environment that is mission-driven, results-focused, and community oriented, this job involves considerable contact with municipal, provincial and federal staff, elected officials, and the general public. It also requires a high level of tact, integrity, political astuteness, and confidentiality due to the great frequency of senior-level internal and external contacts and regular exposure to matters of a sensitive, controversial, and confidential nature.

The Executive Assistant exercises considerable independent judgment and action in his/her daily work in organizing work routines, handling technical work problems, conducting research, managing projects from conception to completion, and providing consultative guidance in prioritizing and managing executive responsibilities.

The Executive Assistant also serves as a liaison to the senior management team, organizing and coordinating executive outreach to aid in driving strategic priorities.

In some municipalities, the Executive Assistant supervises and directs other administrative support staff and monitors their work and performance.



The Executive Assistant supervises and directs administrative support staff and monitors their work and performance

The Executive Assistant to the CAO is typically the highest administrative position in the municipality which enables you to build a strong reputation. But in reality, this isn't about money or glamour, it's about providing valuable support to a person and an organization you believe in. It takes a strong commitment as this job is always changing, and you need to remain flexible even in the face of chaos.

The Executive Assistant to the CAO can be a very rewarding job especially when you see how a successful boss works, and you have the opportunity to share your ideas and influence decisions with a leader. Another bonus is that you always interact directly with your boss daily and have an inside view of the top-level leadership, while most municipal employees can go days or even weeks without really interacting. Some CAOs expect their Executive Assistants to dedicate as much time and energy as they do and are disappointed when they find out you have a life outside of work. This Toolkit will provide you with some tips of how to navigate through many unique challenges that you may encounter.



Did You Know?

When asked what the most important characteristic is that a CAO looks for when hiring an Executive Assistant, the survey respondents indicated that they look for a good fit for the organization, excellent communication, and organizational skills, someone who is loyal, trustworthy and professional, and can anticipate their needs, work independently, and have a positive attitude.

Applying for the Executive Assistant to the CAO Position

Experience

Most job postings for the Executive Assistant position state that candidates must have a minimum of five years' experience working at the executive or senior administrative level providing support, preferably in a municipal government setting. An equivalent combination of education, training and experience could also be considered.

While a college degree is not always required, it can be an asset to have additional education in computer technology or business administration to expand your skill set.

The Executive Assistants were asked how many years of experience they have in their roles, and it is obvious that the majority are new to their positions. This is in line with the current trend in the job market with early retirements and recruitment being difficult. Seventy-three percent (73%) of the survey respondents have under ten years of experience in their position with 50% under five years. Only 8% have twenty or more years of experience in the Executive Assistant position.

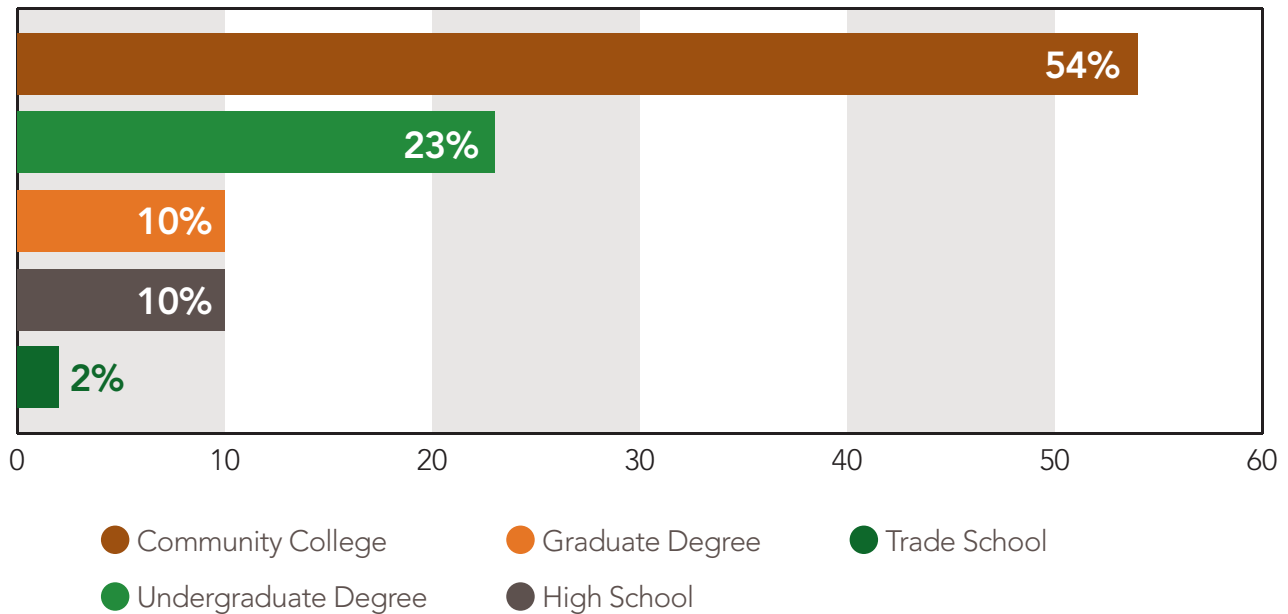
"I've been employed by this municipality for twenty years and the experience that I've gained is the greatest asset".

-Executive Assistant

Education and Training Requirements

Many municipalities require their Executive Assistant to have a post-secondary education in Public or Business Administration or an Office Administration Training Program from an accredited education institution.

Q4 What is the highest level of education you have completed?



The survey indicated that just over half of the respondents have a Community College education:

- 54% have Community College;
- 23% have an Undergraduate Degree;
- 10% have a Graduate Degree;
- 10% High School; and
- 2% Trade School.

"It is an eye-opening experience to work for someone like a CAO, and rewarding to see how a Town actually functions, based on decisions and procedures that the CAO has advised on. The knowledge that I have gained working for CAOs, and senior staff has been the most rewarding aspect, especially for someone who hasn't gone to post-secondary education."

-Executive Assistant

Assessing the Community and Organizational Culture

If you are not currently working for the municipality, assessing the community and the organizational culture is important when applying for any position. Sometimes a position can look great on paper, but when you dig a little deeper you realize the community, or the culture, may not be the best fit for you personally. The political, social, economic, and cultural environment is quite different, not only across Canada but even between neighbouring communities, so it is critical that one researches the community prior to applying, and certainly prior to an interview.

As noted in [CAMA's CAO Employment Contract Toolkit](#), things to consider when applying for the position include:

- 1 Why is the position vacant? If the position was vacated, why did the person leave?
- 2 What has been the turnover for that position? Understanding that low turnover does not necessarily equate to a positive culture.
- 3 What does the organizational chart look like? Will you be reporting to the CAO or are there other senior managers that you will be the Executive Assistant to, such as a Deputy CAO or other staff in the top office. Are you comfortable with the reporting structure?
- 4 If the job posting only lists the pay grade or level, making a call to the Human Resources Department to find out the exact pay range is recommended so that you have an idea if this salary is one that meets your expectations before applying for the position.
- 5 Understand the union versus non-union environment for the community.

TIP: Do your homework! Know the community and its organizational culture. Go through your network and try to find someone who may have some further information about the organization. Find out why the previous individual left the position. Do a quick media search on the community.

Just as it is important to understand the culture and structure of the organization, it is also valuable to do a quick review of the organization's human resource policies if they are publicly available. If they are not, do not be afraid to ask for a copy prior to or following the interview. Often offer letters will reference policy, so understanding those policies and where they apply, or may not apply, to your level in the organization will be critical. It is also important to know that policy can be changed by Council, so if the clause is important, get it into the contract as a standalone rather than a reference to a policy that can be changed. If you are not sure whether the policies of your potential future employer are fair or reasonable, you can test them against regional or provincial best practices. Some Provinces may have organizations or Provincial Associations that have databases of policies, such as the [Ontario Municipal Human Resources Association](#) (OMHRA).

You should look up policies on these topics:

- Vacation
- Sick Leave
- Other Leave Policies (such as Bereavement, Jury Duty, Leave of Absence, Maternity/Paternity Leave, etc.)
- Hours of Work
- Overtime
- Benefits
- Compensation and Salary Administration: Acting Pay, Promotions/Salary Progression, Secondments/Temporary Salary Adjustments, Red Circling, Economic Adjustment, etc.
- Call Out/Stand-By Pay
- Alternative Work Arrangements such as Flex Time, Compressed Work Weeks, etc.
- Code of Conduct

The Politics

When applying and interviewing for the position of the Executive Assistant to the CAO, you must truly understand the politics of the position. While the CAO's position is much more political than yours, it's important to understand that the Council that is in power today will not be the Council in the future. Councils change as does the political environment in which you work so you should be mindful of this.

"You must have a servant's heart. This is the foundation for everything else. A rockstar Executive Assistant wants to serve – and not just your company and organization. A rockstar Executive Assistant wants to serve you. Whether the task is big or little, they achieve their goals by helping you achieve yours. If potential Executive Assistants don't have this quality, no problem. But they probably should look for a different opportunity."

-Chief Administrative Officer

You are the Successful Candidate: Navigating the Job Offer

You have been informed that you are the successful candidate. Receiving a job offer can be an exciting moment and it may be tempting to immediately accept what has been presented to you. However, before accepting any job offer, there are some things you need to consider in deciding if you want to accept the offer or not.

Salary & Benefit Expectations

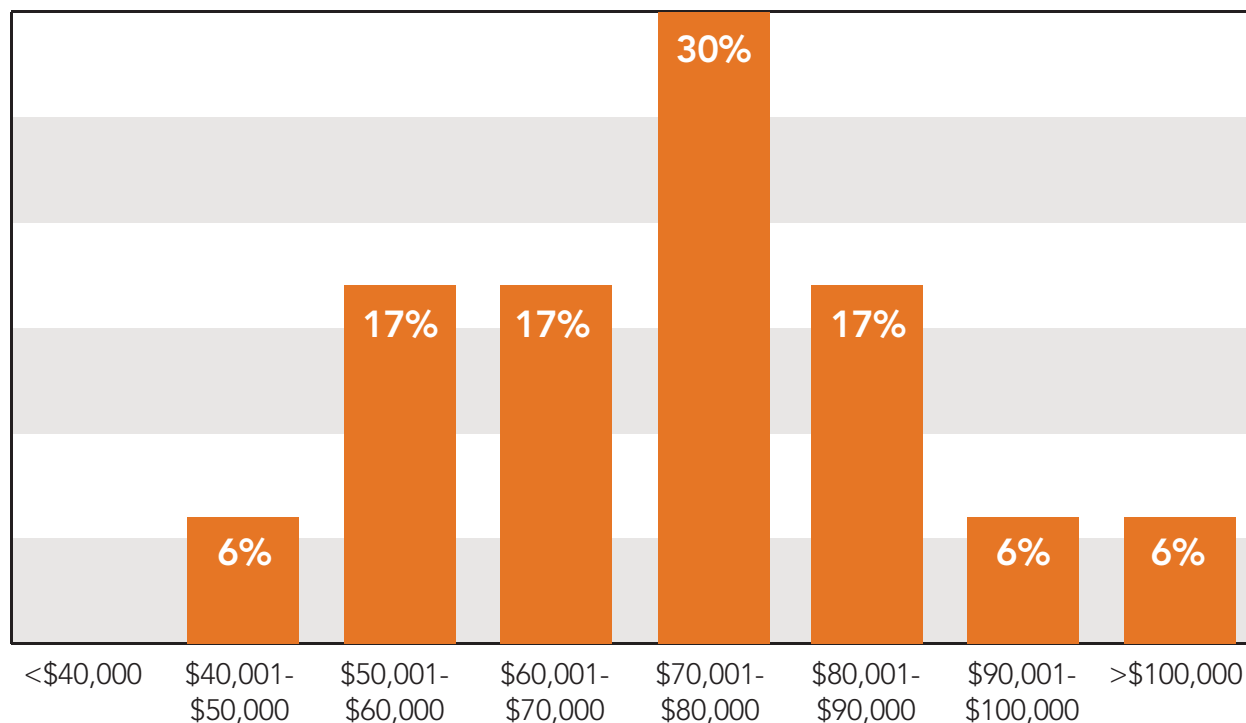
The Executive Assistant to the CAO position is typically a non-union employee, so most municipalities have more negotiation power for the total compensation package to attract talent, retention, and engagement of the right employees.

Compensation

As noted in [CAMA's Human Resources Toolkit](#), there are both internal and external factors that influence compensation. Many Provincial and Territorial Associations do periodic wage surveys, so you may wish to check with your local municipal associations to see if a recent wage survey has been completed. Labour market data should be viewed as one more tool in your toolbox when negotiating if you are the successful candidate. Also, you should always conduct your own industry compensation research **before** applying for the position, and what the exact pay range is as noted above.

The survey indicated that 30% of the Executive Assistants that responded make a **salary of between \$70,000 and \$80,000**; 17% between 50,000 and \$60,000; 17% between \$60,000 and \$70,000; 17% between \$80,000 and \$90,000; 6% between \$40,000 and \$50,000; 6% between \$90,000 and \$100,000; and 6% over \$100,000.

Q6 What is your current salary range?



Case Study: You Have Been Offered the Job, But the Pay Isn't Where You Need it to be.

Based upon personal experience, I regret that I didn't attempt to negotiate when accepting a job offer. At the time, I did not feel comfortable on how to approach the hiring manager with this topic.

Looking back, I would have managed this situation differently. I would have gathered market research for industry rates and asked the hiring manager if there was flexibility in the starting salary or overall compensation such as non-salary benefits like additional vacation time. I would focus on the facts and highlight my experience and qualifications, essentially building a case on the value I would bring to the organization. Negotiation tactics should be based solely upon facts and not emotions.

Once the discussion takes place, you can then weigh your pros and cons and make a decision.

Submitted by an Executive Assistant

Vacation

It is important for you to get recharged and maintain a healthy work-life balance. Most municipalities will have a vacation policy. [CAMA's Human Resources Toolkit](#) notes that vacation is based on the years of service, and vacation benefits increase at certain years during employment. Employment standards entitlements vary by Province/Territory. Therefore, you should consult provincial employment standards legislation to ensure the offer made is meeting the minimum entitlements. Below is an example of vacation based on years of service to be used as a guide:

Years of Service	Accrual Rate per Month	Days Earned
Within 1st year	0.83 days per month	10 days per year / 2 weeks
After 1 year of service	1.25 days per month	15 days per year / 3 weeks
After 5 years of service	1.66 days per month	20 days per year / 4 weeks
After 10 years of service	2.08 days per month	25 days per year / 5 weeks

You may be leaving another position and earn four weeks of vacation, however the entry level of vacation with the municipality is only two weeks. This may be a negotiating point for you as opposed to salary.

Benefits

Benefits are a definite consideration when looking at your overall compensation package.

Most municipalities will have an extended health care benefits plan which you can be part of. Things to consider within your benefits package should include, but are not limited to, the following:

- Dental
- Prescriptions
- Optical
- Health
- Health Spending Account
- Massage/Chiropractic/Naturopathic
- Life Insurance
- Accidental Death and Dismemberment
- Employee Assistance Program (EAP)

Smaller municipalities may not be able to offer you a benefit plan. Therefore, you should ensure there is a slight premium to offset your out-of-pocket expenses when it comes to you and your families overall extended health care package.

Pension

Pension is an area that may vary greatly depending on the Province or Territory. If you are coming from another municipality or private company, looking into the portability of your current and future pensions is an important consideration. This can have a significant impact on your retirement plans, so it is recommended that you review it with an actuary and your own accountant or financial advisor.

Membership in Professional Associations

Just as professional development is important to your current and future career path, so is membership in professional associations. Professional associations can not only be valuable for your career, but they can open networks that can assist in issues and opportunities you deal with in the municipality.

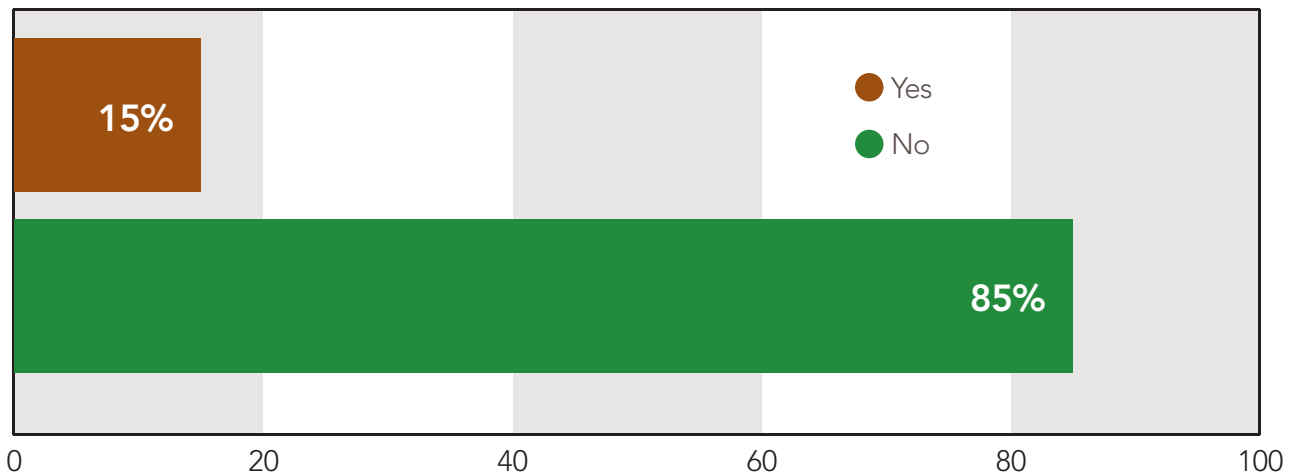
It is important that you include the membership fee to any professional administrative associations in your contract/offer letter.



Did You Know?

Only fifteen (15%) of the survey respondents currently belong to any Associations for Executive Assistants. Some are members of the Association of Professionals of Canada and other municipal organizations such as the Association of Municipal Clerks and Treasurers of Ontario, Alberta Municipal Clerks Association, Manitoba Municipal Administrators Association, and the Association of Municipal Administrators of New Brunswick.

Q12 Do you currently belong to any association for Executive Assistants?

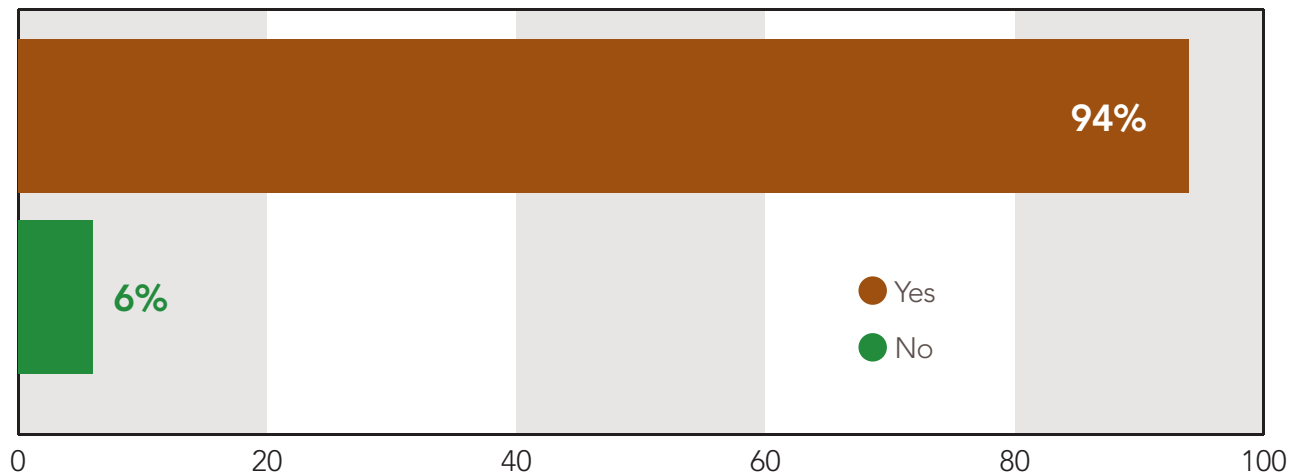


Professional Development

The role of the Executive Assistant to the CAO is a dynamic position that requires the ability to grow, learn and acquire the best skills possible to support your boss and the organization. When there is internal training for new software programs for the municipality the Executive Assistant should be one of the first employees trained so that they are ready to help the CAO and other employees.

Ninety-four percent (94%) of the CAO survey respondents indicated that they provide their Executive Assistant with a training budget each year to pursue education. The annual training budgets noted ranged from \$600 to \$10,000 with the average being \$3,000.

Q8 Do you provide a training budget for your Executive Assistant to pursue education each year?



You should include a line item in your offer letter/contract for professional development, including conferences and continuing education to ensure that this is included in the annual budget.

Case Study: I Would Like to Attend a Conference That Would Really Help me Develop my Skills as an Executive Assistant, But There Isn't a Budget.

Many Executive Assistants manage the office budget(s) for their teams including the CAO, Mayor, Chief Financial Officer, and other senior managers. Sometimes, if they don't find themselves personally responsible for the office budget, they are managing conference registrations, membership fees, yearly subscriptions, and travel budgets, when setting up the yearly calendars for others.

Many times, Executive Assistants have come across an opportunity right up their alley - a conference out of province, a virtual class and/or an in-person training course that they would find extremely educational and would help them develop their skills. However, the funding just isn't there.

This is where regular checkpoints, performance reviews, and meetings with your CAO/or senior executive on a regular basis, could have ensured that this scenario does not happen. An Executive Assistant should outline his/her objectives and goals for the year ahead and with some research planning his/her wish list could be taken into action, and extra 'cost related' training could be discussed.

Another approach, the Executive Assistant could present a short summary as to the objective and/or outcome that would come from them attending a specific conference, outlining the detailed costs and expenditures. The CAO could then review their office budget and if the funds can't be covered off globally in the budget a request could be made to Finance.

I believe the takeaway here, is **planning**. The Executive Assistant and CAO need to work together to ensure that both visions, plans, and budgets are addressed early on. This new CAMA Executive Assistant Toolkit will also allow the Executive Assistant to have tools at their fingertips to address training, and the CAO could set up clear budget goals at the beginning of the year, to ensure funds are placed aside for his/her direct reports, which always should include administration support staff.

"Many Executive Assistants are on their own learning journey and appreciate an annual training budget each year, and like networking opportunities with their colleagues in their own Province or Territory or even across the country. Others also love to learn new skills on the job through their daily experiences, in-house training, coaching and mentorship. Learning will improve their performance in their current job and prepare them for their future. Providing them with the right resources in the right places helps them succeed".

Submitted by an Executive Assistant

Contract Negotiating Skills

If you are the successful candidate to the Executive Assistant position, the next step will be to review the offer letter taking the above-noted items into consideration and enter negotiation with either the CAO or his/her designate in the Human Resources Department. While some individuals value money, others value personal time off and/or benefits. Knowing your values and interests will ensure you enter the negotiations understanding the areas where you have more flexibility and can “give” a little, versus the areas where you have a hard bottom line. It is important to put it all on the table when you are negotiating.

When you accept the job as an Executive Assistant, it is important that you have the confidence to not settle for less than you feel is fair and of your worth, but always ensure the negotiations are respectful.

CAMA’s Human Resources Toolkit (Compensation and Benefits Section) states that overpaying for the job is a difficult situation for a municipality from both a financial and a policy issue. First, paying employees over the top of the pay range can have an impact on the payroll budget which can lead to not being able to give appropriate increases to other staff or not being able to hire when needed. Second, the employer may not be following its own compensation philosophy or legislative requirements. Paying salaries above the agreed upon pay range maximum will inevitably lead to internal inequities and raise concerns amongst other employees. Lastly, as a public sector organization, municipalities need to be transparent and understand the risks associated with paying salaries above the agreed upon pay range maximum, as this could have negative reputational impacts from the public’s perspective and is likely to be damaging to employee morale.

Following are some tips when negotiating, keeping in mind that you should be aware of the salary range when you applied for the position:

- **Self-Assessment.** Assess your qualifications and experience and know your worth from the get-go. Present yourself with confidence and you will automatically feel stronger.
- **The Offer is Never Final.** Always know that the offer is never final, and you have the right to negotiate if you feel you are worth more. You can always ask for more time to make your decision.
- **Don’t Negotiate Just to Negotiate.** You may be very happy with the first offer that is provided to you so don’t negotiate just to negotiate.
- **Pick a Range Instead of a Specific Number.** If you are not happy with the compensation you should pick a range instead of a specific number (and aim higher within reason) but know when to stop negotiating. As noted above, you should also conduct your own research on industry compensation.
- **Understand the Offerings of the Employer.** Understand the offerings of the municipality and their constraints as some are based on Union offerings, and most times the Executive Assistant to the CAO position is a non-bargaining one. If you know the municipality will not negotiate on salary, then focus on modifying some of the other benefit items in the offer such as additional vacation, flex time, etc.
- **Consider the Total Package.** Negotiate multiple issues simultaneously as a package - not one by one.
- **Enthusiasm.** Always show enthusiasm at the table and focus on your skills and expertise. This is the second impression your employer will have of you so make sure you remain professional.

How to Be Successful on the First Day on the Job

The final offer letter has been signed and your first day as the new Executive Assistant to the CAO has arrived. You are understandably nervous, anxious, and probably somewhat intimidated, but also very excited and want to make a good impression. The first few days of a new employee's career are usually the most important.

You should arrive early and make sure you know the dress code before you start. It's important that you dress to office standards, so you look and act as professional as you did during your job interview.

While the onboarding process can be overwhelming it's important that you are not shy, and you give your boss your vision to ensure that it is aligned with his/hers but also tell them what motivates you and what your passions are. This helps your boss know how to manage you.

It is recommended that you meet with the CAO on your first day to establish some clear direction on your roles and responsibilities, to discuss their leadership style and their expectations and most importantly how you can make their life easier. You can refer to the ["How to Adapt to New Leadership" Chapter](#) in this Toolkit, however, below is a list of questions to ask your boss. You should arrive at this first meeting prepared and respecting your boss' time, and to give the meeting some structure, you should also create an Agenda which you send to him/her prior to the meeting (including the questions you plan to ask).

- **Get to Know Your Boss and Build a Rapport.** While you would like to start discussing work-related items, it's important to get to know your boss and spend some time asking questions and sharing more about yourself. It's important to get to know each other as people who have lives and interests outside of work.
- **Positive Approach.** Get off to a good start and strive for open communication. Proactively tell your new boss that you want to be part of the new team and follow up with actions to reinforce this. Asking how you can support your boss and the team and add value to the organization is a positive first step.
- **Know Their Expectations and Leadership Style.** Ask what are their priorities, and what you should focus on immediately. Ask them the simple questions "How can I make your job easier?" "What should I know about your leadership style?" and "What do I need to focus on and learn in the first 100 days"? You want to walk out of this meeting knowing what is expected of you in your new role so ask any questions you have at this time to ensure clarity. Knowing about their leadership style so you can adapt immediately and start building their trust and respect from the get-go is critical.
- **Ask About the Strategic Plan and Council's Priorities.** It is important that you are aware of the corporation's Strategic Plan and any priorities that have been set by Council over the next year. Typically, the CAO's goals are tied to these documents and so is his/her performance, so you will want to know the details from day one.
- **Ask About the Dynamics of Council.** It is critical for you to know any of the dynamics and politics with the Mayor and Council amongst themselves, but also their relationship with the CAO and the senior management team.
- **Ask About the Senior Management Team.** Ask the CAO to review the organizational chart with you so that you can become familiar with the names and any team dynamics with the senior managers that you need to be aware of.

- **Establish Checkpoints from The Beginning.** The days will fly by quickly along with the weeks and months and you and your boss will struggle to find some quiet time to discuss your performance. Establish some regular checkpoints at this first meeting where you will be able to have some one-on-one meetings in the future to have an honest conversation about your performance, an opportunity to seek constructive feedback, and receive coaching. This is also a good time to ask if they will be doing an annual or quarterly performance evaluation, but also to tell your boss how you would like to receive feedback from them.
- **Regular Communication.** Establish a process for how they would like to communicate on regular business and urgent matters. Do they prefer e-mails or verbal questions? Are they open to constructive feedback?
- **Discuss the Future.** Now is the time to share any of your personal and professional development goals that you are working towards and what you see for your career long-term. This shows your new boss that you are motivated to succeed.
- **Attend Departmental Meetings.** Invite yourself to the Departmental meetings. Attending will not only give you the networking opportunity, but it will also provide you with insight into what initiatives are being undertaken throughout the organization (i.e., their workplans, projects, future developments, etc.). This will allow you to keep your boss informed of the upcoming larger ticket items that each Department might have underway. This way, you can prepare your CAO who can then ensure Mayor/Councillors are updated accordingly and in a timely fashion. This is another example of being pro-active. Knowing what lies ahead, prepares both you and your CAO.
- **Watch Council/Committee Meetings Regularly.** Watch the Council/Committee meetings so that you are informed of the topics that Council are considering, and consequently, your boss and staff will be delivering. If the Planning Advisory Committee meetings have live webcasting, you may want to tune into them as well, so that you stay aware of the development projects that are on the horizon.

As you develop your routine and become familiar with your day-to-day activities you will no doubt create some standard procedures, templates, and checklists. You will also want to set some professional standards and expectations so that you don't sacrifice quality for efficiency in this high paced environment. The image you present on your first day in the office, and the way you interact with people are direct reflections of the CAO. It is always safe to err on the side of caution and be overly formal in this position.

Always remember that it will take some time to get to know your boss and his/her personality, so have patience. After a few weeks on the job, ask your boss how you're doing and get some feedback early - this will help you both.

If you are currently an Executive Assistant to the CAO and have never discussed expectations and communications as outlined above, it would be recommended that you set up a meeting with your boss as soon as possible. **Communicating on a regular basis, no matter how long you've been in the position, should never be underestimated.**

Tips on Completing Your Performance Evaluation

CAMA has a [Performance Evaluation Toolkit](#) to assist the Mayor and Council with the CAO's performance evaluation. Having the CAO complete your performance evaluation is equally important. Performance evaluations show appreciation for and feedback on your work as an Executive Assistant. This should be an **"ongoing process – and not just an annual event."**

The key value to conducting a written performance evaluation provides an opportunity to increase communication between the CAO and the Executive Assistant. It also gives the Executive Assistant an opportunity to discuss any challenges you may be facing, and to identify your goals and career aspirations so that a plan can be developed.

The days are very busy in the CAO's Office and sometimes things such as the performance evaluation fall behind, however it is important to set some time aside in both of your calendars for regular conversations or "check-ins". **This cannot be overstated.** Building a solid, respectful working relationship will advance everyone's interests and avoid having surprises arise over the course of the year.



TIP: Set up quarterly reviews for a more formal approach to “checking-in” which gives the opportunity to review/change things along the way, especially if you are new at your job. Performance Evaluations are not meant to be negative - they are meant to improve communication and your relationship with your boss.

Use this [sample template](#) of a performance evaluation that both you and your boss should complete to review at your quarterly and/or annual meetings.

[CAMA's Human Resources Toolkit](#) also has a chapter on Performance Management which would be good to review prior to your evaluation.

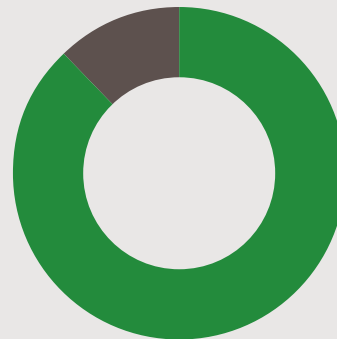


Did You Know?

The response from the survey was extremely positive.



77% of the Executive Assistants received an annual performance evaluation.



88% of the CAOs provided an annual performance evaluation.

“Make sure you have a yearly evaluation so that you can see where your weaknesses are and to improve on what the CAO suggests that you can work on as an Executive Assistant.”

-Executive Assistant

How to Develop a Back-up Plan/Succession Plan for the Office

Have you ever felt guilty for taking a vacation or **not** taken a vacation because you don't have any coverage for the office? Or unforeseen circumstances come up where you might have to be absent from the office? You need to have "your person" that you can call immediately to cover for you.

It is important for you to get away from the job, to disconnect and disengage in order to feel rejuvenated when you return, and to recover from the pressures and stresses of a very busy job.

It's always a good idea to have a back-up to cover the office if you are out sick or on vacation. When you start your position, or at the beginning of each year, discuss your vacation plan with your boss to ensure that there is an understanding that a back-up will be provided for you. Let's be candid, the onus is on you to find your back-up, or it won't get done. However, it is important to have your boss' approval on the back-up person that you are recommending - the fit also needs to be a good one in your absence.







The Executive Assistant to the CAO is typically a non-union position so it will be important to find another individual in the organization that is also not in the union and that you can trust with confidentiality and the other duties of the office. You should also explore "Acting Pay" for this individual if they are in fact doing 100% of your job during your absence and are paid a lower salary than you. Some individuals to consider for your back-up would be staff from the Mayor's or City Clerk's Office, as well as other Executive Assistants to Directors/Commissioners in the organization. A side benefit is that it's good for one of your colleagues to be your back-up and enables them to obtain experience in another area in the organization.

Preparations Make Vacations More Enjoyable for Everyone. Given the many balls in the air in the Office of the CAO, when the Executive Assistant is going on vacation, they often make extensive preparations to ensure that everything is looked after for their boss before they leave. Training of your back-up should be completed to set them up for success. You should ensure they are familiar with your boss' preferences, the office and its procedures, and what the expectations are of them in your absence. If possible, you should prepare a detailed procedures manual of some of the tasks that need to be completed on a regular basis. Documenting your processes will make certain that nothing falls between the cracks, as this can happen when everyone thinks someone else is responsible for a task.

While it may seem obvious, it sometimes gets overlooked but one of the final details that you should complete on your last day at work before vacation is to record an appropriate message on your voicemail, and likewise compose an appropriate message for the e-mail system. These messages should be explicit in who they need to contact during your absence as it's important that the Mayor/Council, staff and citizens can reach the CAO during this time, and the office continues to run smoothly and at full capacity.








We would also recommend building a checklist for vacation preparation to avoid any interruption of your vacation. Below is a sample for your information.

Sample Checklist for Executive Assistant Vacation Preparation

 Reconcile your work.	<ul style="list-style-type: none"> • This includes any projects you can feasibly finish before you leave and any unread e-mails. • Get your unread e-mail number as low as possible.
 Leave yourself a note.	<ul style="list-style-type: none"> • Detailing what was delegated and to who, what you completed, what you did not complete, and what needs immediate action upon your return. • List every task you have; while the information may be fresh in your mind right now, a week or two of being away may fog your memory.
 Ensure your CAO's calendar is in order before you leave.	<ul style="list-style-type: none"> • Make sure the CAO's calendar is up to date; all materials for meetings are organized and easy to find. • Ensure your coverage delegate also has access to make any necessary changes.
 Schedule a pre-vacation coverage meeting with your coverage delegate.	<ul style="list-style-type: none"> • To provide updates on any projects and open activities. • Schedule a meeting for when you return to catch up on anything you missed while you were out. This will also give you an opportunity to address any new action items that require immediate attention.
 Set up an Out of Office Reply.	<ul style="list-style-type: none"> • That thanks the sender for their message and includes when you left, and when you will return. Include alternative contacts for senders to connect with should they require immediate assistance.
 Provide your personal cell phone number to your CAO and coverage delegate.	<ul style="list-style-type: none"> • In the event there is an emergency and one or both need to contact you.

It is also important for you to assist the CAO prior to their vacation or time out of the office on the things they need to do. Below is a checklist for you and the CAO to refer to so that nothing gets missed and you are aware and up to date on all initiatives.

Sample Checklist for CAO Office Vacation Preparation

 <p>Inform the senior management team in advance.</p>	<ul style="list-style-type: none"> • Let the team know about the CAO's absence two weeks in advance. • This allows team members to re-schedule meetings and tasks as well as send any work-related items ahead of time.
 <p>Set up a calendar event on the CAO's personal calendar to block vacation days.</p>	<ul style="list-style-type: none"> • To avoid having meetings and calls scheduled during out of office days.
 <p>Get overdue tasks out of the way.</p>	<ul style="list-style-type: none"> • Make sure the CAO finishes up any pending tasks or schedule when they will complete the work. • Ideally, complete tasks in advance.
 <p>Set up a pre-vacation coverage meeting with the Acting CAO.</p>	<ul style="list-style-type: none"> • Provide a quick overview of what has been done, what needs to be done. As well as for any meetings being attended in the CAO's absence.
 <p>Find out who receives the CAO's cell phone and hotel details.</p>	<ul style="list-style-type: none"> • In case of emergency (this can be tasked to the Executive Assistant).
 <p>Set up an automated e-mail response.</p>	<ul style="list-style-type: none"> • E-mail should indicate how long the CAO is absent, when they are returning to the office, as well as the contact information for the Acting CAO and the Executive Assistant.
 <p>Set up a post-vacation coverage meeting with your Acting CAO.</p>	<ul style="list-style-type: none"> • The Acting CAO to provide an overview of what has happened while the CAO was gone.

"I ensure I utilize the vacation that I am allotted with no excuses – the work will be there. I also make sure that I have trained a competent replacement for my time away, so my stress is minimized.

-Executive Assistant

"The most challenging part of being an Executive Assistant is being expected to fill in for the CAO in their absence, and not being informed on a lot of necessary information. The lack of communication makes it difficult to fill in seamlessly.

-Executive Assistant

Case Study: I Haven't Taken a Vacation in Years Because I Feel Guilty

Taking vacation to me was more work than what I thought it was worth and I felt guilty. It was the amount of work that had to be done to get ready to go on vacation and the fear of returning to a mountain of work and e-mails, and that something would get missed in my absence. When I did take vacation, I was still working or thinking about work. With all the technology available, it might seem like it would be easier than ever to take time off, but it really is the devil's advocate because now you can connect from anywhere. I truly have a lot of admiration and respect for those Executive Assistants who have been able to create those boundaries and look after the most important person - you.

During my twenty-seven-year career with the City of Fredericton, recently resigning as the Office Administrator for the Chief Administrative Officer and Mayor, I had six months of unused vacation that I had accumulated over the years - that's half a year / 180 days. Thankfully, my boss' didn't have the "use it or lose it attitude".

How do you step back from a job you love, unplug, and relax and let somebody else that is extremely capable handle everything in your absence? How do you let it stop dictating your life? Why did taking vacation make me feel like people would think I was lazy? I had an excellent back-up from the City Clerk's Office but never wanted to inconvenience somebody else to do my job that already had a full workload. It was always difficult for me to ask for help.

Being a Type A personality, a perfectionist, a nurturer, and the fear of disappointing those that I worked for were my own worst enemies. My boss' never made me feel that I could never leave my desk or take a vacation - in fact they always encouraged it and appreciated my dedication each day. It was my own doubt that they wouldn't have what they needed, the public wouldn't be served the way they should be, a phone call or e-mail wouldn't be returned within the hour, our office's reputation wouldn't be the same, etc., if I wasn't the one there to answer the phone, write the letter or speech, provide that warm greeting, and make sure everything ran smoothly.

We all know that taking time away from the job can have physical and mental health benefits and those that take vacations have lower stress - but for me it caused higher anxiety. Even though my days were sometimes 18 hours a day, I consistently fit in my workouts or yoga and that is how I remained resilient and positive to keep on going. At least I made time for myself daily but that's not enough to sustain the pace that I was keeping for many years.

Some days I think I was meant to work at a job where it was 8:15 a.m. to 4:30 p.m. and when I went home my job was done until the next day. However, the Executive Assistant role was my true calling, and to this day I don't regret one extra minute and missed vacation because I would like to think I made a difference in the organization and the community, and made my boss' lives easier.

I still struggle with taking vacation in my role as Executive Director for CAMA but must remind myself daily that the only thing that will have changed when I take a vacation day and unplug is that I have less time left on this planet than I did before, and everything will still go on.

Having said all of that, my advice would be to schedule a vacation and let your boss know when it will be and arrange your back-up as per your office plan. Don't ask for the time off. Tell them you're taking time off. Tell YOURSELF that you're taking it off. Sometimes you are trapped by yourself, after all. Vacation is a chance to invest in your own well-being to take time for self-care, personal and family vacations or just a chance to step away from the daily grind to freshen up the mind and body - this should not be overlooked.

The next time you're thinking of stepping away from the office and using your well-earned vacation, do it. Don't think about that dignitary coming into the office, that citizen calling complaining that you want to help (you really didn't need to be hollered at anyway), the looming deadlines, etc. It will benefit your health in more ways than you will ever know.

I need to practice what I preach but I admit that I am still a "work in progress" and will commit to getting better. Namaste!

Submitted by an Executive Assistant

Promotions - When is the Right Time?

Is it okay to love your job as an Executive Assistant and not want to be promoted? Of course, it is. Some Executive Assistants see the position as a steppingstone with a desire to move up in the corporation while others are “lifers” and expect to retire in the same position.

The truth is sometimes you may not get promoted because you are too good at your current job. But what if your boss is always encouraging you to take more courses, get involved in other corporate activities, but you really don't have any interest? There's always a fear that you will appear ungrateful, but it is okay to turn down a promotion if you think it is not right for you. You should clarify that you're passionate about the job you are already doing and maybe you can discuss how you would like to develop in ways besides a promotion to management. We all know that being a manager comes with extra responsibility and more time in the office. This can result in less work-life balance, which should always be a factor when deciding if taking a promotion is a good step for your career. Timing is everything in your personal and professional life - you do what is right for you.

When Do You Know When It's Time to Move On? In general, three to five years in a job without a promotion is a good time to establish a track record of success without suffering the negative consequences of job stagnation. You will know when you are ready to move on when an opportunity comes up in the organization that is personally and professionally of interest to you.



Case Study: My Boss Says do You Want to be an Executive Assistant Forever?

This statement was never taken in a negative context (well maybe not the first time I heard it); my CFO at the time saw something in me that even I did not recognize I had. He made me think, push my own agenda, and really look deeper inside as to what other challenges and/or career moves I could take on. This is an example of a very good boss.

About halfway in my Executive Assistant role, and during a performance discussion this topic had come up. I had already taken on a few 'extra' projects, learning from our peers and sitting on many project initiatives I had realized that both my feedback and skillset was an asset. I also ensured our corporate admins were trained and in the loop during any new launch of a program, software, or corporate news (I had developed an internal safe workspace for our junior admins). My CFO saw potential during my presentations, collaborations during leadership team meetings, and of course my passion.

These events or initiatives not only added to my portfolio, but it also helped me be noticed in the corporation and not just as the CFO's Secretary. Over the next few years, I took on the courses and mentoring required to potentially be ready if a position became available. The important message here is that you work as a team, and during your performance discussions discuss your goals and visions, this could simply be within the Executive Assistant role, or potentially an opportunity in the future.

The connection to have these safe conversations was what led me to grow as both an Executive Assistant and eventually a Strategic Advisor. I learned that having goals was okay, and that I too could find my voice to share a vision or idea. Many Executive Assistants feel their voice or suggestions don't matter as unfortunately many are shut down when sharing. This was never my case.

I strongly suggest that when thinking about career changes and progression advancement, you stay true to yourself and write it all down. I would scribble on a notepad a thought or vision that came up, my iPhone had a note feature devoted to where I kept my 'brave' conversations typed out, so if an opportunity arose, I was ready. I practiced my conversation in front of a mirror, over and over in the privacy of my own home, even my pet dog had the opportunity to listen to many of my proposals (he always thought I was on the right track). What I am getting to - the more you prepare, the more research and investment you make in yourself, the better you will feel, and the outcome could only be best for all.

Also, if you're addressed with this scenario "do you want to be an Executive Assistant forever?" and the first thing that pops into your mind is "YES, of course I do". Then that too is SO okay, as being an Executive Assistant is the most rewarding job I have ever had, and it certainly was about the positive difference I made in people's lives which was what I loved the most.

Submitted by an Executive Assistant

The Top Ten Skills of an Effective Executive Assistant to the CAO

Behind every successful CAO is an exceptional Executive Assistant. Acting as gatekeepers and problem solvers, your responsibilities go way beyond the basics. You do everything to make your CAO and organization successful and you are an extension of the person that you support. You get to know their expectations, their working style, and the small things that make their job easier.

Based on the feedback from both the CAOs and Executive Assistants in the survey, following are the “Top Ten” Skills of an Effective Executive Assistant:

1 Excellent Communication.

Excellent communication skills and customer service are a must. Executive Assistants communicate with a variety of audiences including staff, elected officials, and the public, and need to be able to write and speak clearly to represent the CAO and the municipality in a positive manner. They have a unique ability to understand the difference between conversational communication and being a professional liaison. They also must possess the highest level of listening abilities. They listen to conversations in the office, among peers and within networking groups. They listen digitally to social media trends and industry news and keep their finger on the pulse of the community around them. They listen actively to even those non-verbal cues from their boss and others and can discern the best course of action.

2 Organizational Skills & Multi-tasking.

A top-notch Executive Assistant can take a day of chaos and turn it into a well-oiled machine. The Executive Assistant role is a fast-paced and constantly changing one, so organizational skills are essential especially when tasks need to be prioritized and deadlines need to be met. Developing organizational systems to improve processes is also a must and you must be ready to pivot at a moment's notice when an urgent need arises - then you must resume the previous task when the crisis ends. Often this shift occurs many times throughout the day. Taking interruptions in stride and learning how to multi-task is a skill.

3 Time Management.

How do you plan for your most productive day? There will always be busy schedules to manage and deadlines to meet, and how you can plan and know those moments is critical. Working for many bosses you may also find yourself with a sudden increase of work volume. Rockstar Executive Assistants help their bosses limit distractions and focus only on the most pressing issues. When duties need to be performed quickly and efficiently, knowing how to manage the time during the day, and being able to perform tasks with confidence, are essential if you and your boss are going to excel. It takes sound judgment on your part to figure out what warrants attention and what you need to shut down.

4 Detail-Oriented.

Attention to detail is a key skill that Executive Assistants should have. Whether it's avoiding and correcting grammar and spelling mistakes, processing data, or organizing events, one mistake can have a big impact. CAO's are busy and often in a hurry. It is up to the Executive Assistant to double check every detail, and triple check every document to ensure accuracy before it leaves the office.

5 Technology Savvy.

The best Executive Assistants are not afraid of new technology, and in fact, embrace it. They will routinely look for tools and resources to streamline communication processes and fix inefficiencies in the office. When things go sideways technology-wise, an Executive Assistant rarely has time to wait for IT to fix things. The ability to troubleshoot for your boss is a must-have skill. Having a strong handle on the latest trends is also critical so you are prepared for any tool that is introduced to the organization.

6 Proactive Critical Thinking.

The strongest Executive Assistants think about the "what-ifs" and can see ten moves ahead and anticipate issues before they become full-blown problems. They can address their CAO's needs, even before they are aware of them. With every situation that arises in the office they ensure that everything runs as smoothly as possible, and everyone is able to operate as a team. Being proactive allows you to have a sense of control over whatever situation you may be facing and will enable you and your boss to be more prepared. Proactive Assistants aren't afraid to make a decision if the situation arises. They can think outside the box but also within the municipality's guidelines to find innovations, solutions, and improvement.

7 Adaptability in a Changing Environment.

Change is constant, especially in the CAO's Office. Executive Assistant duties often change day to day and sometimes they need to change course mid-task. As the first team member to hear about major decisions, Executive Assistants can lead the charge and convince co-workers to adapt to changes and can also pass along any concerns to the CAO. A great Executive Assistant has sound judgment and knows when and how to take action and respond to issues immediately on their own. They have to switch gears, but all tasks still get completed on time.

8 High Level of Confidentiality, Trust & Integrity.

An Executive Assistant holds a high-trust position. There needs to be mutual respect between you and the CAO. Discretion and confidentiality are so important to the Executive Assistant role. Being privy to everything behind the scenes can be difficult and learning how to manage it professionally is important. Always be vigilant when information is in your care, and make sure it's never left where others can gain access to it. Working for the CAO, others will know you have access to privileged information. Be aware of this when there is workplace talk going on. Some may press you to tell them things and it's important to be ready to deny them the information politely but firmly or remove yourself from these discussions altogether.

9 Diplomacy and the Ability to Perform Under Pressure.

A stellar Executive Assistant always seems to know what to say and how to say it in any situation. They know how to communicate with diplomacy, tact, and confidence especially when they are under pressure and dealing with political situations and resolving conflicts to find common ground. Some of the everyday situations in the CAO's Office can become stressful and good Executive Assistants stay calm, figure out a solution, and don't let anybody see them sweat.

10 Professionalism.

The Executive Assistant to the CAO must represent their CAO in a positive and professional light both inside and outside of the organization - they are the spokesperson for the Office and must develop positive relationships. In many situations, your words are treated as if they are your boss', so polished e-mails and proper etiquette are a must.

"Never compromise trust...it is extremely hard to win back."

-Chief Administrative Officer

"Be focused on what you do, always prepare items from a due diligence lens, maintain a very high level of integrity and confidentiality, be personable and enjoy what you do. Don't be afraid to have fun!"

-Chief Administrative Officer

Technical Executive Assistant Office Skills

Following is a detailed list of duties and responsibilities of an Executive Assistant mentioned by the survey respondents (with #1 being mentioned the most, etc.):



- | | |
|--|-------------------------|
| ① Meeting Management (Agendas/Minutes) | ⑩ Report Writing |
| ② Communications | ⑪ Event Management |
| ③ Scheduling and Calendar Management | ⑫ Records Management |
| ④ Financial/Human Resources Management | ⑬ Organizational Skills |
| ⑤ Executive Administrative Support | ⑭ Internal Liaison |
| ⑥ Research and Analytical Skills | ⑮ Project Management |
| ⑦ Leadership Skills | ⑯ External Liaison |
| ⑧ By-law and Office Procedures | ⑰ Supervisory Skills |
| ⑨ Travel Management | |

More detailed information will be provided on the above-noted list throughout the Toolkit.

Meeting Management

Agenda Preparation

Executive Assistants are often involved in preparing Agendas for Council meetings which are typically the responsibility of the Office of the City Clerk. You may also be responsible for chairing and preparing the Agenda for senior management meetings. Having an Agenda that outlines what you'll discuss ensures everyone stays on topic and uses the meeting time efficiently. The following template is an outline for a meeting Agenda which notes the item, time allotted, the lead, whether it is for information or decision, the description, and the name of any attachments.

Agenda Item / Time Alloted / Leader	Decision/ Information	Description	Attachments
Agenda Item / Time Allotted / Lead Person	Indicate whether it is an information item, or a decision needs to be made.  	Description of Agenda item.	Name of any attachments.

Meetings are held to share information, seek input, or make a decision. Here are a few tips to take into consideration when developing your Agenda:

- **Identify the Goals.** Identify the goals of the meeting including any regular Agenda items. Incorporate any questions that you need answered during the meeting and be clear about the decision-making process. This will ensure that all participants know what to expect and can prepare their answers beforehand.
- **Seek Input from Participants.** Meetings should engage the whole team, so it's best to send them an e-mail with a draft Agenda asking them for any additional topics that they would like to cover.
- **Develop the Agenda.** Prepare the final Agenda using the template noted above or your own and review it with your boss. It is important to estimate the amount of time that you plan to spend on each topic which will keep you on schedule and ensure you cover all items. The lead person on the Agenda item should also be noted, a description of the item and the name of the appendices if applicable.
- **Circulate the Agenda.** Prior to the meeting, e-mail the Agenda and all supplementary materials to all participants well in advance. This gives everyone a clear outline of the items and timing especially for any team members making presentations.
- **Meeting Follow-up.** It's important to follow-up on any items immediately after the meeting, and prepare the minutes while the information is fresh. Also, reflect on how effective the meeting was and make any adjustments for next time.

If you don't already chair the senior management meetings, you may want to ask your boss if this is a task that you can take on, which will not only provide you with great experience but will keep your finger on the pulse of the entire organization.

Minute Taking

Minute taking is not a task that everybody loves, however it's important in your everyday job - whether it's just jotting down some notes when your boss is talking, taking a phone message, or being the Recording Secretary in a meeting. When people first start taking minutes, they are often thrown into the meeting with little formal training or support.



Did You Know?

In the survey, one of the top training areas that the Executive Assistants felt they needed to do their job better was "minute taking", while the CAO's encouraged continuous learning and personal and professional development.

When writing the minutes to the meeting, the easiest way to determine what to include is that the person reading them should feel like they attended the meeting. If you are taking minutes to a Council meeting, these are the official record of all resolutions made by the municipality, who was in attendance, and are legal documents. They are an important part of good governance.

Minutes are taken by shorthand (the old school way), typing along with your laptop/computer, or in some instances they can be recorded. Check with your municipality on their recording procedure as some do not allow the recording of a meeting especially in a closed/private session.

So how do you condense a meeting that may last several hours into a few pages of concise minutes you ask?

Click [here](#) for a great article from Indeed.com explaining what meeting minutes are, what every set of minutes should contain, and some tips for writing minutes. In summary, here are the steps you need to know about taking meeting minutes with more of an explanation in the article:

- ① **Plan a format before the meeting.** Setting up your minutes prior to the meeting using the Agenda is half the battle. This will make you feel more organized and able to start right away under each topic in capturing the discussion. If there is a template that the office already uses, or one used by the City Clerk's Office for Council minutes, then you could use this or create your own.
- ② **Write extensively on important matters.** The mover and seconder of motions is important along with whether the motion was approved, as well as mention of those who may have voted "NAY". If you are taking Council minutes you should ask the City Clerk or City Solicitor what necessary information needs to be recorded as per the legislative requirements and the practice of the municipality. Verbatim minutes may not be the practice but noting any actions or key takeaways is important.
- ③ **Get a copy of budgets and reports.** Having a copy of all reports prior to the meeting is important so that you can prepare and read them. This will help you understand the discussion during the meeting.
- ④ **Double-check what you have written.** If there is anything you need clarification on that was discussed during the meeting, make sure you double-check while everyone is still present as you want to make sure you interpreted the conversation accurately. If you can, communicate with the Chairperson immediately so they can request clarification from the relevant parties.
- ⑤ **Type the minutes.** It's always good to start the minutes as soon as the meeting is over, so the discussion is fresh in your mind. The minutes should reflect the discussion and not your opinion, and should not include any conversations that have no relevance to the topic discussed. This is a grey area that you must get good at.
- ⑥ **Get the minutes approved by colleagues.** You can send the draft minutes to the Chair of the meeting, and/or the CAO (your boss) to ensure that your interpretation is the same as theirs.
- ⑦ **Forward the minutes to the attendees** of the meeting or whatever process is followed in your municipality. They may be loaded to a portal like e-Scribe to be available in time for the next meeting.

TIP: Circulating the minutes as soon as possible after the meeting is also a good best practice.

Chairing a Meeting

You may be asked to chair a meeting, whether it's a regular weekly meeting with the Directors/Commissioners, senior management team or one with your colleagues. Do you have the planning and leadership techniques that will give you the confidence to run a meeting which will be engaging for the attendees and leave them with a positive and lasting impression? Do you need to improve your meeting management skills?

Meetings are held every minute of every day and it's important that everyone's time is protected and that these gatherings are used effectively to build a corporate team.

The SuccessFactory provides the following tips on how to chair a meeting effectively:

- 1 **First, Know the Purpose of the Meeting.** You need to understand the purpose of the meeting well before it takes place, and any other preparations begin. This will help you to keep everything on track and focused on a clear, definable goal.
- 2 **Be Prepared.** Once you understand why you're chairing the meeting in the first place, you'll need to prepare every aspect and detail in advance (the Agenda, logistics, etc.). Fail to prepare; prepare to fail.
- 3 **Outline the Agenda.** At the beginning of the meeting, make sure every attendee understands, as you do, the purpose of the meeting and the Agenda.
- 4 **Take Minutes.** Take notes and minutes, even if there is a Recording Secretary in attendance. You may need to refer to your notes if the Recording Secretary requires clarification, and to ensure that any follow up is detailed. Attendees may be less likely to provide input in future meetings if they see their ideas are forgotten as soon as the meeting is over or not given the attention they feel their ideas deserve.
- 5 **Give Everyone a Voice.** Everyone should feel that they have an equal part in the meeting and be comfortable voicing their opinion or sharing an idea. It is your responsibility to ensure that everyone is heard.
- 6 **Keep Things Moving.** Keep one eye on the Agenda and another on the clock to ensure that every topic is covered. Dwelling on a point for too long will mean that you don't give other topics the time they deserve and will lead to an ineffective meeting.
- 7 **Ask for Questions.** Once every point has been covered, you can open the meeting up for questions. By allowing questions at the end, you ensure that every team member is clear about what has been covered and what needs to be actioned.
- 8 **Determine a Clear Outcome.** The purpose of any meeting is to, in the end, determine a successful outcome. Did you achieve the purpose of the meeting? If you didn't achieve what you set out to achieve then, clearly, you haven't chaired an effective meeting and you'll likely need to chair another one.
- 9 **E-mail the Minutes.** E-mail out the minutes to all attendees of the meeting. This enables them to double-check the points and alert you to anything you may have missed. **It also provides motivation to work on any follow-up items.**

The Chair must allow all Committee members equal opportunities to speak and to maintain an unbiased view of the topics discussed. The Chair is expected to oversee the meeting and not to influence the outcome.

TIP: Whether you are Chairing the meeting or just making the arrangements for your boss, it is always helpful to re-send the Agenda approximately three days prior to the meeting to bring it to the top of their inbox.

Scheduling and Calendar Management

Managing a CAO's calendar and meetings sounds easy, right? It actually is a skill where you must balance priorities and time and determine where the boss' time is best spent - and plan his/her calendar accordingly.

There are so many internal and external meetings, events, and tasks to organize for you and your boss. Some bosses keep their own schedule/calendars and others rely on you to do this for them. Meet with your boss to determine how he/she would like to manage this task as we all have our own preferences for both in person and virtual meetings. We all know that the switch to virtual meetings did not reduce the number of meetings - the number has substantially increased. Here are some tips on calendar management for the CAO:

- Group similar activities in blocks. If the CAO is meeting with Councillors or Directors individually on the same topic, you may want to book them over a two-day period instead of two weeks.
- Optimize time for various meetings in person and virtual. Can some be held virtually as opposed to travelling to other municipal buildings?
- Eliminate back-to-back appointments in case a meeting runs over the time limit. This also provides the CAO with some time in between meetings to return phone calls, check e-mails, meet with that one Director or Councillor that just needs to see them, etc.
- Schedule enough time for travel time in between meetings and block this time off in the calendar so it doesn't get booked by you and/or the boss.
- Sometimes you just have to say "no". As accommodating people, we try to fit everybody in, but it ends up creating chaos and stress for you and your boss as you end up rescheduling them.
- You may want to get in the habit of reviewing the weekly calendar with your boss on Friday afternoon or Monday morning to prepare for the week; **this is a must.**
- Ask your boss when they will be taking their annual vacation in September of each year so you can plan into the next year.
- Make sure your boss has the 15-minute reminder on Outlook as a prompt of the next meeting.
- Some boss' may ask you to keep a specific day and time each week free from meetings to allow them to concentrate on other things that may come up. Respect this time and keep it blocked.
- When your boss is travelling, be mindful to block off enough time before the trip and consider any jet lag upon their return. For example, if he/she arrives home on a Wednesday night, block off his/her Thursday morning to allow time to get settled back into the office before they are inundated with meetings.
- Every person has a specific period when he/she feels more proactive. Ask your boss what their preference is, and you can also schedule meetings around this. For example, maybe they don't want meetings first thing on Monday morning or Friday afternoon.
- Understand that there are going to be times when you must reschedule a meeting last minute due to an unexpected circumstance in the office or personally for your boss. Reschedule it as soon as possible even if the next available date is days/weeks.

- Managing your boss' calendar is a balancing act and you must make sure it is not too rigid and remain calm if things don't go as planned. Your job is to make your boss' job easier and you do what it takes with professionalism to make that happen.
- Prioritize the meetings and tasks based on importance and urgency.
- Ask your boss if they take drop-ins/walk-ins from staff, elected officials, and citizens, and follow these rules.
- Keep analyzing and adjusting the calendar to better suit your boss' needs and make sure he/she continues to have a work-life balance.

TIP: Try to leave the day of a Council meeting free for your boss for any last-minute drop ins from the Mayor/Council and staff.

Lastly, at the beginning of each year, you may wish to set reminders in your CAO's calendar for personal milestones such as anniversaries and birthdays, but also some important professional dates such as work anniversaries for the management team and employees, events, etc. Booking off the statutory holidays is also a good idea to ensure that meetings don't get confirmed on these days.

"Use your calendar as a tool to keep you organized. Color code things like tasks, meetings for Council, and meetings for Council that you will also attend. I put a "Discuss with Mayor" meeting above our scheduled meeting time on the calendar and attach any e-mails I want to discuss with her. I also add notes in the body so my discussion items are easy to find and all in one place."

-Executive Assistant

TIP: Use the CAO's calendar (not your own) to book meetings so when you are away your back up and/or your CAO has the opportunity to change or cancel meetings.

Respecting the CAO's Time

There are times that the CAO is on a tight schedule, and it is your responsibility to ensure that they stay on schedule. If you have an individual that is meeting with the CAO that you know does not respect time, let them know when they arrive that he/she only has X amount of time and must be in another meeting. If this person still does not come out of the meeting on time, then politely knock on the door to let the CAO know their next appointment has arrived. However, it is important to discuss this tactic with your boss prior to implementing it.

E-mail Management

Some CAOs delegate the task of managing their e-mails to their Executive Assistant and this can seem daunting at first, but once you get used to your boss and how they would like you to manage their work, it will become easier. It is important that you both understand how they would like you to respond to their e-mails, and more importantly, what you should keep and what you should delete. For example - what would your boss like you to do with newsletters, sales e-mails, and junk e-mail? Knowing that you can put these items in the junk folder and delete everything cleans up the inbox quickly.

Practically Perfect PA provides a [list](#) of 20 do's and don'ts for e-mail management which are useful as a starting point for Executive Assistants that you can review with your boss:

DO'S

DO: Check their e-mails at the beginning of every day to review what has come in overnight. Action e-mails as appropriate.

DO: Make use of the e-mail systems technology. I use Outlook and find the following helpful:

- 1 **Flags:** I use this mainly when my manager is away on business or annual leave. I flag when they need to respond to something or when they need to know that I've dealt with an e-mail. Using flags helps lower the chances that you are duplicating work
- 2 **Rules:** One of my Executives receives ridiculous amounts of newsletters, sales e-mails and invites to events etc. When I first started, I would ask him if he would like to attend anything, he never did. Then I asked him if he wanted me to print the newsletters out for him, that was also a negative response. Finally, I said do you want me to clear these out of your inbox, this was greeted with a much happier reply so now I have rules that take the e-mail straight to the junk mail and I delete everything once a day.
- 3 **Colour coding:** This will help your manager to quickly realize who has e-mailed them and what to prioritize.

DON'TS

DON'T: Print out all their e-mails for them to review. They should be viewing their e-mails via their computer/blackberry/iPad etc. Printing everything out generally leads to delays, it is a waste of paper, and it is more challenging to track responses.

DON'T: Be afraid to demonstrate how proactive you can be. Managing e-mails is something we as assistants do exceptionally well and once the Executive relinquishes this responsibility, we can show how much time and energy we will save them to go and work on other things.

DO'S

DO: Cc your manager into an e-mail if you have dealt with it and they need to know. This practice is useful if you are new to the job and you want to prove to your manager you are capable, in time this exercise can be reduced as you both gain more confidence in your abilities.

DO: Use a bring up folder for important e-mails and attachments that relate to any upcoming meetings the following day. This will allow them to review any discussions that have taken place over e-mail before the meeting.

DO: Set up a good filing system for your manager's e-mails that you are both comfortable with. I would suggest that the inbox area should be used for 'live' e-mails that are waiting for something to happen to them, i.e., to be actioned, to be filed etc. Ensure you have a folder that your manager uses to store e-mails for you to deal with and it will help you know exactly what they want you to handle rather than guessing.

DO: Check their sent and deleted items as well as the main inbox. In the early days of the job, it will give you a good understanding of how they answer e-mails and the tone that they take with different colleagues and clients. Also, sometimes e-mails can be accidentally deleted when they should be filed.

DO: Think about ways to bring their attention to specific e-mails if they need to deal with something urgently and are unavailable to you - change the subject line, use flags (not applicable on a blackberry apparently).

DO: Use other methods to make your boss aware of their urgent e-mails other than just e-mailing them. Try a concise voicemail message, a text, or Instant Messenger.

DON'TS

DON'T: Keep your e-mail management process static as you should be looking at ways you can tweak or improve the system. Work with your manager to evolve the process and have regular discussions regarding new apps or tools that could assist you both.

DON'T: Worry if you don't know what to do with individual e-mails. Keep a list of questions you need to ask and ensure you have enough time with your manager to get through everything. Even if you take 5 minutes to get a yes or no answer, you will be able to then deal with the correspondence appropriately.

DON'T: Share what you see on your manager's e-mails with anyone else ever. You are in a trusted position and what may seem like an innocent e-mail could be highly confidential.

DON'T: When managing your boss' e-mails don't live in their inbox, it will limit the amount of time you have to do your work. Instead, check their e-mails a few times during the day.

DO'S

DO: Be transparent, make sure people are aware that e-mails are coming from you and not your boss. This will indicate to others that your boss trusts you to make decisions and answer on their behalf.

DO: Respond to e-mails on the same day even if it is a holding note until you can speak to your manager.

DO: Write a few standard replies that your boss is comfortable with you using when, for example, you are declining an invitation, replying to an unwanted sales e-mail or they have been asked to speak at an event.

DO: Format attached documents for your manager before printing. If they are going to read the report on their computer screen or hand-held device, ensure it is clear and easy to view.

DO: Ask your boss if they want you to deal with private messages from friends and family. If not, set up a rule that means you do not see any of their private e-mails.

DON'TS

"Be willing to continually learn and find a good e-mail organizational system and use it consistently.

-Executive Assistant

Travel Management for the CAO

Business trips can be stressful for everyone involved. For your boss, their time is filled with many meetings or an action-packed Conference, all while trying to keep up with the office across time zones and dealing with jet lag. And for you, arranging travel for your boss can be hectic while continuing to keep up with your other responsibilities.

Included is a sample of a [travel itinerary](#) template that you can use when organizing your boss' trip to help streamline everything so its all-in-one document for them (attaching the tickets and other information).

Research Prior to Meeting with your Boss

Before you even meet with your boss to discuss his/her preferences to make the trip a successful one, check on the following City policies:

- Review a copy of the City's Travel Policy to ensure that all requirements are being adhered to.
- Does the City use a travel agent through the Purchasing Division, or can you make the arrangements yourself using on-line tools?
- What is the City policy on using personal vehicles versus rental vehicles?
- What is the City's policy on an employee collecting airline points or rental car company loyalty points for City travel?
- Does the City have a policy on the pricing of travel including economy airfare, type of hotel rooms, etc.?
- What are the travel per diems when completing the travel expense claim upon your boss' return?
- What is the policy on paying for travel expenses while on the road? Does the employee have to use the City corporate credit card or can they use their personal credit card?
- Check the City's policy and the corporate telephone service provider to find out the rates for international roaming packages and what the steps are for activation.

Meeting with your Boss on Travel Preferences

When booking your boss' travel arrangements be sure to ask him/her the following questions to ensure that his/her preferences are honoured and guarantee the trip is successful.

- Do you currently have a passport and what is the number?
- Are you vaccinated for COVID-19?
- What airport do you prefer to fly from?
- Do you like window or aisle seats in the front or back of the plane?
- Do you have any extra leg room preferences?
- Do you prefer morning, afternoon or evening flights?
- Do you have any in-flight meal preferences or allergies?
- Do you have access to any airport lounges?
- Do you have an airline points card?
- What do you prefer for ground transportation? Train? Taxi? Uber? Rental Car?
- Do you prefer a certain rental car company, and do you have loyalty points?

- Do you have a hotel loyalty card?
- Do you prefer a certain brand of hotel/accommodation? What type of amenities do you like? (i.e. good wi-fi, working space, gym facilities, room service, etc.)
- Would you like a hotel that you can walk to restaurants?
- Do you prefer an airport hotel or one in town for a quick overnight stay?
- Does your cell phone have an international roaming package already activated?
- Would you like a copy of your itinerary sent to your partner or family member?

It's also important to remember that preferences change with time and circumstance. Your boss might prefer different things for different trips and it's good to keeping a running list on an easy-to-edit-file. Some of these preferences may be the same for each trip, however others might be more specific. Maintaining this list of priorities will eliminate repetitive conversations and save everyone time. This [Personal Preferences template](#) and checklist will help you keep track of your boss' travel preferences.

The Ultimate CAO Travel Arrangements Checklist

Be prepared for last minute changes and unexpected circumstances and be ready to pivot due to bad weather, a cancelled flight, a situation at the office that calls for them to get back early, or an extension of their trip. Due to time changes you might not always be available to make these changes so be sure to include the e-mail and phone numbers for all the service providers if they have to make the changes themselves.

Having an additional checklist that you can refer to when making your boss' travel arrangements for each trip helps you prepare for both the expected and the unexpected. Below is a checklist that you can refer to when planning your boss' trip now that you have his /her preferences on file:

- Ask him or her what needs to happen to make this trip a successful one.
- Make the arrangements using the Personal Preferences Checklist that you already have on file.
- Visit Trip Advisor to ensure that the accommodation that you have chosen is reputable and check the reviews.
- Cross-check Hotel Wi-Fi Test to check connection speeds.
- If your boss is travelling internationally, you could suggest that they download apps for a currency converter, translation, hotel, etc.
- Check to ensure that the roaming package (if travelling internationally) is automatically activated or have the package activated before he/she leaves for their trip. Without a package the roaming charges can be a surprise and very expensive.
- Check to make sure his/her passport is up to date.
- Double-check any travel visa requirements.
- Print car/travel insurance information.
- Print any COVID-19 travel documents (vaccination certificates, test documentation, etc.) and check to see what the requirements are for the travel location.
- Prepare and print an in-depth itinerary (using the sample template noted above) including meetings and other planned activities. But also save screen shots of important information they need at their fingertips.
- Ensure their partner and/or family member have a copy of the itinerary if this is one of their preferences.

How to Prepare an In-depth Travel Itinerary for your Boss

The details of each trip can be found in one place by using the [travel itinerary template](#) which you can provide to them electronically, but its also important to provide them with a paper package/travel binder before they leave the office for those times when the Wi-Fi isn't reliable, and they can't get online.

While screenshots are a quick and easy method of ensuring your boss has access offline, you can go the extra mile to prepare a travel itinerary that includes elements specific to their business trip.

Break down each day and walk through their activities step by step. For any travel arrangements on top of departure times, include more details to help things run more smoothly. Note the booking confirmation numbers and contact numbers for car rentals. For flights, include airline phone numbers, the terminal's address, confirmation numbers, flight numbers, seat reservations, and any membership numbers for loyalty programs.

If you have booked any car services, include these details and the contact numbers for the driver and the company.

There can be several hotels in major cities from the same well-known brand. To ensure your boss' trip gets off to a good start, include the address of their specific hotel and the contact details for the front desk just in case (making sure it's not a 1-800 number if possible). Note the booking reference, any relevant loyalty program numbers, and finally, the check-in and check-out times to make their stay as straightforward as possible.

Add your boss' meetings to this itinerary and include details which will save them delving through their e-mails or other documents while rushing between appointments. In addition to the time and location, jot down the purpose of the meeting and who will be attending.

Find the LinkedIn profile pictures of the people they will be meeting with, so they are easier to recognize on arrival, and any contact details for the attendees and the location if your boss needs to get in touch. Finally, include the travel times between their first meeting and their subsequent appointments so they can keep this in mind as the day progresses.



Highlight any periods where your boss has free time. If they have an hour between meetings, offer suggestions for where they can get a bite to eat or a coffee. For longer stretches, provide some nearby attractions they could visit or the travel time back to their hotel if they wish to return for some downtime.

After you have completed the itinerary, save it as a PDF and e-mail it to your boss and their partner or designated contact (if this is their preference) so that loved ones can know where they are in case of emergencies during their trip. Print two hard copies to make the information easy to always access.

Here are some examples of little extras that you can prepare in advance for your boss that will make a difference:

- Backup luggage tags.
- Extra business cards.
- Information and contact details of the local host (client or office manager).
- Healthy, compact snacks with protein.
- Restaurant recommendations based on their favorite foods.
- Travel adapters and surge protectors for their equipment.

Now that you've got your boss prepared for his/her trip - it's important that you know their schedule and their time zones to ensure that when you need to reach them, it's when they aren't sleeping or in an important meeting.

Follow-Up and Completing the Travel Expense Report

Following the trip, have a quick conversation with your boss about how the trip went and what you can do differently next time.... you become their travel agent so it's important to build upon each trip and continuously improve. Top executives expect a high level of service even when it comes to travel.

When your boss returns to the office be sure to get all his/her receipts so that you can complete the travel expense report quickly. If they prefer to do their own expense report, you can complete some of the pre-fill sections of the trip details to enable them to get this task done faster.

Communications

Having excellent communication and people skills as an Executive Assistant is important in creating a positive image for the CAO and the organization - even when some of us are introverts. Every day, you speak and interact with dozens of people both inside and outside of the organization, digitally, on the phone, and in person. You are always in contact with your co-workers at all levels of the organization, elected officials, and members of the public listening to their needs. You are an expert at speaking to different types of people, from the most junior intern to the high-profile CAO or other Executive, as well as displaying cultural understanding with all people.

Your communication skills range from the technical skills of preparing correspondence, composing newsletters, writing speeches and PowerPoint presentations, answering phone calls, along with many leadership skills including listening, managing conflicts, and negotiating - just to name a few.

To excel in the job, Executive Assistants must develop relationships with many people. Assistants often must ask for favors, and having a rapport makes a big difference. Folks are more inclined to lend a hand to pleasant individuals.

How many times have you met someone, whether it's a new City Councillor or employee, or a citizen that has dropped by, but five minutes later you have forgotten their name because you have ten other things on your mind? Having a good manner with others is very important and everybody wants to be that unforgettable person because of their stellar communication and networking skills, negotiation techniques and starting conversations. Extra points if you have helped an individual in the past and remember personal details like kids' names or recent vacations.

An Executive Assistant is, of course, the direct representative of the CAO and therefore must present themselves professionally in a way that represents the CAO and the City. That goes far past dressing well, and extends into being well-spoken, well-informed, and putting people at ease as a host. You aren't just representing yourself - you're also communicating for your boss and the organization.

While there are several courses that you can take for effective communication in the office, the number one success factor is developing a positive relationship with your boss and other senior managers in the organization. Knowing that you can make decisions in a matter of seconds and not have to wait for feedback, also provides better customer service. Have those daily check-ins with your CAO and always keep the communication two-way. In the CAO Chapter there are some tips on ["Why Meeting Regularly Works"](#).

The best Executive Assistants are personable yet tough. They can tell when to challenge the boss and when to comply. They know when to lighten the mood and when to stay serious. They are friendly with the boss without crossing boundaries. The boss' both like and respect these individuals.

Also, great Executive Assistants build relationships with the boss' inner circle, including the boss' family and closest colleagues.

Communicating in a Virtual/Hybrid Office

It would be fair to say that being an Executive Assistant throughout the pandemic has brought many challenges with greater and more varied job responsibilities, more streams of communication to keep open, and a hybrid working environment to navigate. More than ever, we have had to pivot in the virtual environment and be proactive and adapt to the new ways to continue to add value to the CAO and the organization. The expectations of Executive Assistants are changing with the new hybrid working environment.

The challenge is to understand how to work efficiently and effectively with the CAO's Office on how to structure the work and team in the hybrid world. It's important that the new policies of working from home are delivered appropriately and that the CAO's Office provides the necessary information management tools and technology to create a digital workplace that contends with hybrid work along with security protocols. Remote work settings add another layer of complexity to relationships and teambuilding, and to being an Executive Assistant. A top-performing Executive Assistant always needs to keep the communication channels open with their boss and continue to maintain communication with the entire senior management team - whether in the office or working from home.

The traditional work model no longer meets the needs of the organization. Employees require access to the appropriate information to do their jobs, wherever and however they choose to work.

Some of the regular tasks you may have performed prior to the pandemic have diminished in priority while other tasks, such as organizing digital events and many virtual meetings, have become larger priorities. The workload has increased, and it may include a wider set of tasks or perhaps even taking on the roles of some of your colleagues that are now working from home. It is important that you maintain and develop your skills in the virtual environment to ensure you can adapt to new responsibilities if required. It is also important for you, as the Executive Assistant, to continue to build relationships internally and externally with staff to address any new challenges or problems they have.

In remote hybrid settings, it's important for the CAO to set up regular check in meetings with the management teams and ensure he/she is available to respond to any of them that may require support. Rather than respond via e-mail, sometimes picking up the phone or making a Zoom call can be more effective while also providing that human personal touch. Text, phone, and face to face. It's important to know what the most appropriate method of communication is based on the problem, topic, or meeting.

As an Executive Assistant, it is important to remain "tech savvy" to help your boss. Upgrade your digital and technology skills to support your boss in all these areas. There are courses on task management tools, event and meeting planning technology, project management tools and other collaboration tools. Even prior to the pandemic, it was a good idea to keep up with emerging technologies, to improve your work and enable you to be more efficient in the office. Staying on top of the emerging trends will help you stand out from others who are late adopters in the organization.

One of the challenges that you will face as an Executive Assistant in a hybrid work environment is making judgements about which aspects of your job are best performed at home and which are best performed in the office. It would be recommended that the tasks that could be best done at home would be research and administrative activities, however you also must keep in mind that you need to be in the office when your boss requires your help - as ultimately you are there to make their life easier.

Listening Skills

Because Executive Assistants are managing multiple tasks your active listening skills help get the job done. Listening is the key to building effective working relationships with your colleagues and managers. Here are some tips:

- 1 **Resist Distractions.** Be aware of noise in your work environment that can create barriers to active listening (especially if you sit at a reception desk or cubicle).
- 2 **Be Helpful and Attentive.** Active listening helps people feel emotionally supported and understood, especially when they are upset. Give the speaker your undivided attention and acknowledge their message.
- 3 **Show that you are Listening.** Use your body language and gestures to show that you are engaged.
- 4 **Avoid Judgment.** Avoid negative judgement based on the person's appearance and/or verbal delivery. Sometimes these things keep us from using quality active listening skills because our attention is focused elsewhere.
- 5 **Ask Questions.** Ask open-ended questions.
- 6 **Summarize.** Following the call or conversation, repeat and clarify the message so the person knows that you understand their request. They will know that you paid attention to them and were engaged.

When taking a telephone call, another good suggestion is to always use the person's first name when you are talking to them. As soon as they call and mention their name, write it down on a post-it notes so you can continue to refer back to it during the conversation. It's that personal touch that counts.

"Listen carefully and communicate clearly."

-Executive Assistant

"Two ears – one mouth: Listen attentively and speak carefully."

-Executive Assistant

Customer Service

Providing exceptional customer service when you work in the public sector is not an option - it's mandatory. How many times have you heard from a citizen "I pay your salary!""?? We face many unique challenges in providing exceptional levels of service to the citizens and residents of our communities as the expectations are high. And quite frankly, the citizens are our bosses and we provide them with the quality of life that they have in our communities.

In municipalities, we have internal and external customers. The external customers are the citizens, residents, visitors, and businesses. Our internal customers are employees, co-workers, managers, and the Mayor and Council. It is important that excellent customer service is provided to both internal and external customers.

The James Madison Group Inc. states the following Top 10 Reasons to Serve Well:

- ① Positive self-image and personal satisfaction.
- ② Reduces complaints and makes the job easier.
- ③ Portrays you, your team, and your community in a positive light - good public relations.
- ④ Keeps quality people in the community.
- ⑤ Your job depends on it. Citizens do pay your wages.
- ⑥ Happy citizens "reflect" back positive energy.
- ⑦ Citizens are more likely to support us.
- ⑧ Develops community pride and goodwill.
- ⑨ Builds trust and confidence with citizens.
- ⑩ Improves employee morale and productivity.

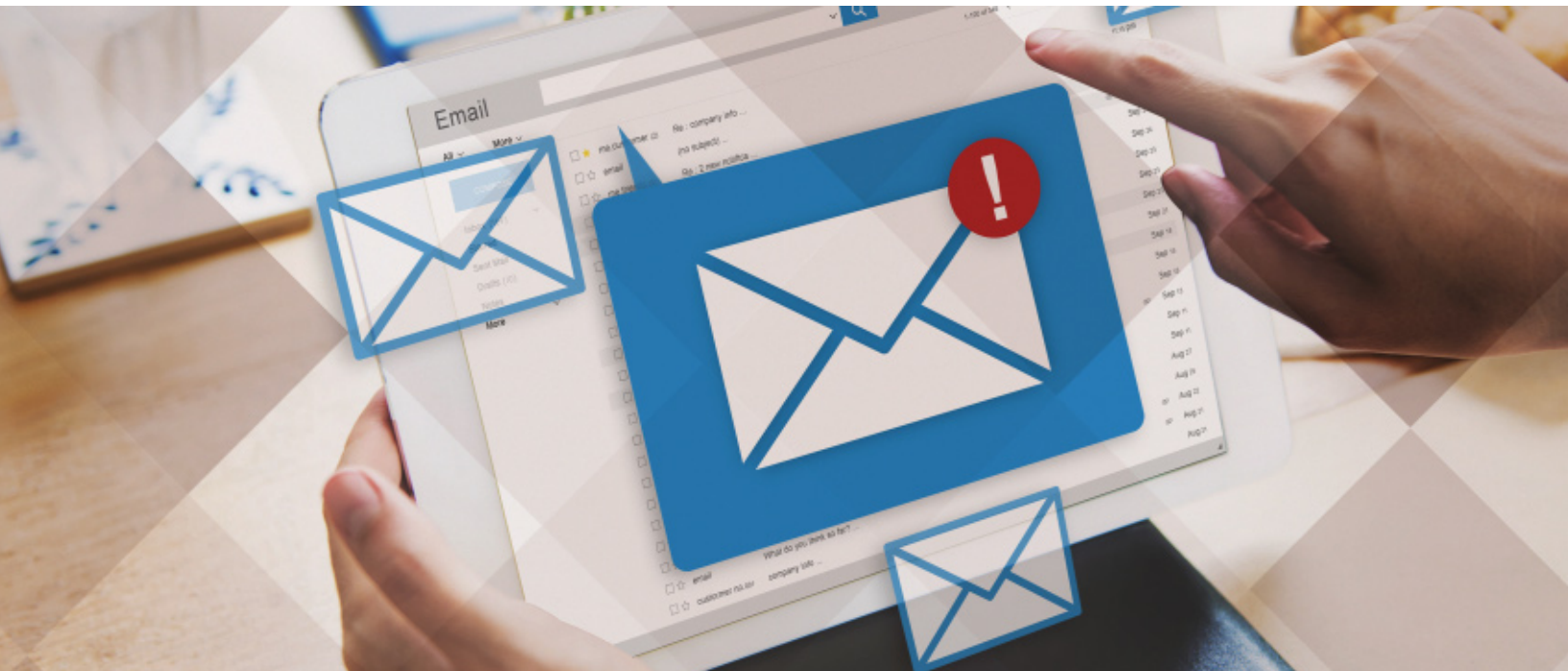
And the “7 Top Challenges in the Public Sector” are as follows:

- ① Citizens have higher and sometimes unrealistic expectations of government.
- ② Everyone is a customer or boss or expert. They tell us they pay our salary to show they’re “entitled” to service because they’ve already paid for it.
- ③ Regulatory restraints (laws, policies, codes, ordinances, etc.) can remove flexibility in providing services.
- ④ Budgetary restraints and limited resources.
- ⑤ Dealing with rude, difficult, even abusive customers.
- ⑥ Getting along with each other and other Departments.
- ⑦ We’re more visible - like a fishbowl or glass house.

Customers expect promises to be kept, responsiveness (a sense of urgency), concern and honesty. They **do not** expect to be talked down to, have complaints treated as nuisances, excuses, or to hear “That’s what the policy says...” or the runaround from any municipal staff member.

You should set a standard for you (and the CAO’s Office) on the length of time that you will take to respond to a request (from an internal or external customer). A reasonable standard would be two hours or at least by the end of the day, even if it’s just to let the customer know that you are looking into the issue and will respond as soon as you have new information to report. Often you will have to contact another Department to find out the answer before you can respond appropriately. Always remember that there are two sides to every story so hearing the staff member or elected official’s side is paramount to resolving the issue.

Again, when e-mails are received it is also customary to at least acknowledge the e-mail right away and let them know you will be in contact with them when you have the answer.



Case Study: Exercising Patience with the Public

A recent situation comes to mind, wherein a resident visited our Office of the CAO/Mayor to express their views on a matter unrelated to the City of Waterloo as it was a Provincial responsibility. What began as a simple conversation escalated as the visiting resident became agitated with the lack of response and assistance available to them as a result of the discussion. A notable factor in this occurrence was the lack of awareness on the part of the resident in better understanding the unique responsibilities of each level of government when it comes to specific services and programs available to the public.

In this instance it was important to remain calm and practice active listening as well as finding points in the conversation to provide clarity to who the responsible party was to address the concerns of the resident. While unable to directly provide a solution to the resident, identifying solutions for them to pursue was of importance and assisted in closing the conversation out in a way that offered them a takeaway.

A key takeaway from this occurrence is that there are varying levels of awareness within the public when it comes to the topic of local government. It was a reminder that patience is essential in all discussions as information we may be aware of, or existing knowledge we contain, is not generally recognized or existent with the general public and does take time and clear communication in order to share and inform. It was a further reminder of the importance to continue to promote and undertake efforts to share information in a clear and effective manner.

For any individuals facing similar situations, and in the world of local government it appears to be something that happens regularly, I would advise that patience is an essential skill that cannot be undervalued. It is important to listen and recognize the reasoning for a resident's frustrations and look, where possible, to identify possible solutions that can be offered to address these concerns. Finding common ground and speaking in a way that is clear and informative is crucial to any engagement which we undertake as government representatives.

Submitted by an Executive Assistant

Gatekeeping Skills

We have all heard the term before that the Executive Assistant is the "gatekeeper" with the main role being to support their boss. Gatekeeper barely covers the description of your full responsibilities, but you are essentially the person that gets the job done in supporting the CAO in their daily decision making about the organization and the other Departments.

You know that there are constant demands on the CAO's time and attention. An effective gatekeeper will review any requests before they get through to their boss as it is your responsibility to protect your boss' precious time. You need to be aggressive and ask follow-up questions to determine if the request is worth the CAO's time. This questioning will help you decide where it should fall on his or her priority list. You essentially control who gets an appointment with the CAO and when. You need to manage this grey area based on your own judgment. It is your job to protect the CAO from unwanted salespersons and phone calls as well.

You also need to make a personal decision in what information/reports/e-mails, etc. go to your boss and what does not. A lot of information you can deal with, and your boss never sees it. One of the common phrases of gatekeeping is "What is this regarding?"

You are often in charge of passing on the CAO's decision to others which means you are the messenger which isn't always a pleasant experience. This is where you must know your place and remember to pass along the message exactly how it was relayed to you and not give additional input.

It's always amazing how some people (within the organization and externally) treat the gatekeeper. The gatekeeper is the person closest to the CAO that they are trying to reach, so if they know to treat this person with genuine respect, he or she will be their greatest ally.

Social Media In and Out of the Workplace

How do you most effectively deal with social media invitations and updates which are dominating the way citizens and employees interact with your office? We are all beginning to communicate more through electronic means rather than face to face. Society is feeling the need to be always updated on all things and talking on the phone is ancient history. Social media has become a "time pig" and can have a drain on our productivity. We all love to share, but be very careful of what is alright to share and what should not be sent out - on both a professional and personal basis. Think about how you can be more productive with the new way of electronic communication while keeping that "personal touch" in mind.

For your personal social media pages, always remember that the internet is public, and you still represent the CAO's Office. Even when you think you are posting something privately, once it is released into the cyber world, it is out of your control and potentially can be used against you in the future. This is especially important in a job search, so keep it clean.

Also, never post negative opinions about your job, employer, or boss on social media. If there is a controversy at the City about a particular topic, you should in no way comment negatively - better yet, why comment at all?

TIP: How an Executive Assistant shows up at a professional public event, needs to be the same way he/she shows up on YouTube.

Negotiating Skills

Having good negotiating skills is a priority for a CAO which means it's also good for you, as the Executive Assistant, to have this gift. When you work in the Office of the CAO you are always dealing with complaints, resolving conflicts between employees, outside parties, elected officials, grievances, etc.

The Balance Careers has a great blog on "[Important Negotiation Skills for Workplace Success](#)".

The Executive Assistant Role in the Emergency Operations Centre

In the event of an emergency or disaster in your community, the Emergency Operations Centre (EOC) may be activated during the response. It is not uncommon for the Executive Assistant to the CAO to support communication activities taking place at the site of the emergency and/or coordinating requests at the Command Centre, including establishing priorities, preparing press releases and disseminating emergency information to inform, alert and warn the public, analyzing and evaluating data, and developing a plan for the continuance of regular duties – just to name a few.

Letter Writing

One of the most important skills of an Executive Assistant is communication – and that includes knowing how to write a letter, whether it's responding to a citizen inquiry by e-mail, letter, or social media post. Depending on the style of your CAO or Mayor you should choose the most suitable format for the audience. Would this person appreciate a handwritten letter, a typed letter, or an e-mail response?

In addition to the date, contact information, opening salutation, content of the letter, closing salutation and note of any enclosures or copies - the tone of the letter needs to connect with your audience. Even if it's a business letter exchanging pleasantries, a personal connection to the reader is recommended. However, if your boss has never met the recipient, you should stick to a more formal courteous formal response.

If there is a lot of information to convey in the letter, make a small list beforehand to be used as an outline to make sure nothing gets lost. This is especially important for any invitations for events – make sure you state all the logistics including where, when, directions, dress code, etc. This in turn saves follow up e-mails or phone calls with questions.

Like any correspondence that comes from the CAO's Office, make sure it has the right tone and is proofread several times.



Speech Writing

When your boss (the Mayor or CAO) asks you to prepare their speech for a community event you will need to do some research. Know the audience, how long they have been asked to speak and the topic. It is also important to write the speech from the appropriate political angle because if it is not correct information and/or the delivery of the speech doesn't go over well, you will receive feedback immediately.

Ensure you prepare the speech in a timely manner so that you can review it with your boss, make any edits or additions, and provide them with ample time to practice.

- **Know the Topic/Purpose.** The invitation or request will typically have some background on the event and the topic. Don't be afraid to call the event organizer to get more information so that you are educated about the topic before you put pen to paper.
- **Know your audience.** Always know who is going to be in the audience and tailor the message in terms of ideas and language. What do you want your audience to walk out of the room remembering? Let your ideas flow first and then put them in the right order, then edit and polish what you've written.
- **Know the length.** Don't guess how long the speech needs to be - always follow up with the event organizer. As an event planner, you know how an extra five minutes from one speaker can derail your event. Keep your eye on the target length and remind your boss of the maximum time allotted for his/her remarks.
- **Write & Practice.** Before you give the final speech to your boss, you need to practice it to ensure that the message flows and how you're doing on length.

Conducting Research/Writing Reports

Reports are everywhere in local government - from each Department (Directors to the CAO), City Council meetings, the Planning Advisory Committee, and the list goes on. Writing is a key method of communication for most people and it's one that many people struggle with especially with the change to communicating through e-mail, text messaging and social media. Developing writing skills is as important as creating reports, Agendas and minutes.

For the better part of every day, we are communicating to and with others either in person or in writing. Whether it's the speech you write for your boss or deliver yourself, the letter you prepare for the discipline of an employee, or a response to the disgruntled citizen, the way in which you deliver it will trickle down throughout the organization and impact everyone involved. You may also be responsible for writing the reports from the CAO to Council.

Following are some tips on writing a report for Council or sometimes called the “Request for Decision” report for your boss, keeping in mind that every municipality may have a different format that you are required to follow as per the corporate policy and direction from the Office of the City Clerk.

- **Note the Audience.** Address the report to the Mayor and Council or the Chair of the Committee (depending on the meeting).
- **Sections of Acts.** Note any sections of your *Municipal Act* or *Local Governance Act*.
- **Type of Session.** Is the Agenda item being discussed in the Open, Closed or In-Camera session (if this is an option). “In-Camera” means private with no media, sometimes only certain staff, etc.
- **Issue.** Provide a one or two sentence description of the issue.
- **Recommendation.** This should include the recommended resolution to be passed by Council.
- **Situation, Background, Discussion.** Explain the current situation, if there was any previous direction given on this file by Council, how does it align with the Strategic Plan or CAO goals, and the history.
- **Financial.** Include the budget implications to be reviewed by the Chief Financial Officer/Treasurer.
- **Legal.** Indicate any legal implications to be provided by the Office of the Solicitor.
- **Communications.** Does there need to be corporate or strategic communications provided based on any changes that will affect the public or staff?
- **Climate Lens.** Is this proposal in line with the City’s Community Energy Emission Plan and/or Climate Change Adaptation Plan?

A sample [Template of a Council Report](#), [Briefing Note Template](#), and [Request for Decision](#) can be reviewed as a guide.

Effective Grant Writing

Municipalities prepare applications for grants and funding assistance available to local government from organizations (such as the Federation of Canadian Municipalities) and other levels of government for worthwhile projects. While some hire a professional writer to help, others put together their own grant packages paying close attention to the target audience. Under the *Freedom of Information Act* you can also request copies of funding grant applications that you may want to use as a template.

While there is not one approach that works for all grant submissions/applications, following are some tips to assist you:

- **Follow the directions.** Read the instructions a few times to ensure that you understand the criteria and what information needs to be included in the application. More is not always better in a grant application, but you must tell your story and have a thorough budget.
- **Start the process early.** Know the grant submission deadline and work backwards to create a schedule. There may be many municipal departments that need to be involved in the process (i.e., feasibility studies, budget information, municipal audits, letters of support).
- **Establish a Contact.** Be aware of who your contact is for the grant process and don’t hesitate to ask questions.
- **Develop a Focused Submission with a Clear Vision.** This is where knowing your audience is advantageous to tailor your writing accordingly ensuring that your project is well defined with milestones, who will benefit, and what will happen if you do not secure funding under the grant. Flowcharts and timelines are also effective.
- **Review, Review, Review.** Proofread your submission but also get a fresh set of eyes on it.

Financial and Human Resources Management

Budget Administration

Each year, your office will prepare a budget and while some of us enjoy dealing with numbers, others may fear them. As gatekeepers, we must also be the leaders in lowering costs, improving efficiency, all while increasing customer satisfaction.

When preparing the budget for the Office of the CAO make note of the following:

- The budget guidelines for the year (which typically are under the signature of the CAO and/or Treasurer/Director of Finance) are sent out to all senior managers. It's also a good practice to send the guidelines to the Executive Assistant of each Department. Review this document to ensure that your budget is within the guidelines as the CAO's Office must also show leadership and follow the rules.
- Send an e-mail to any staff under the CAO's Office asking for their professional development and conference requests for the budget year.
- Schedule a meeting with the CAO to review the budget to ensure that you have included everything in his/her vision. This will be the time to discuss any line items such as Special Projects, Consulting Fees or any other items under the CAO umbrella that are required for the next year that may be covered off globally for the organization.

TIP: Budget preparation time is a good opportunity to talk to your boss about your professional development for the next year.

Each month you may also be expected to complete a variance analysis for the Finance Department. It is important to let the CAO know of any over-expenditures (or savings) at this time so that they are aware and are not caught off guard by the Treasurer/Chief Financial Officer or at a Committee or Council meeting.

Executive Assistants who excel at managing the office budget can add a lot of value to their boss and the organization. You should also manage the "City's purse" like you do your own household personal budget. If you have a strong eye for saving money on things such as office supplies, travel, events, and catering, you will be a great asset to the CAO. If he/she knows the "City Purse" is under control, then life will be a lot easier.

If managing the CAO's budget is not something you currently do, maybe ask your boss if this is a new responsibility that you can experience.

Human Resources Management

Sometimes in the smaller municipalities, the CAO also has the title of the Human Resources Manager which means that the Executive Assistant also performs some human resources related tasks. [CAMA's Human Resources Toolkit](#) is a great resource for all municipal employees working in local government and for all size populations and municipalities with or without a Human Resources Department. It is designed to provide information regarding several different human resource topics with support of over 200 best practices, policies and templates across the country.

Equity, Diversity and Inclusion

CAMA's Human Resources Toolkit has a Chapter on Equity, Diversity and Inclusion. It states that "Equity, diversity, and inclusion (EDI)" is a continuous journey of unlearning the entrenched views that guide how organizations operate. EDI strategy is an instrument through which systemic issues and the way things are done can be challenged and changed within the organization. Equity focuses on the outcome of "fair treatment." Fairness looks different based on an individual's power and privilege in society. While equality focuses on equal opportunity, equity addresses the accommodations needed to accomplish a fair result by considering individual differences.

Within the *Employment Equity Act* (the Act), four groups are specifically targeted for implementation of equity measures: Indigenous People, Persons with Disabilities, Visible Minorities, and Women.

Diversity refers to the unique differences and characteristics of individuals: Inherent diversity e.g., race, gender, sexual orientation, or disability; and Acquired diversity e.g. diversity of thought and backgrounds, cross-cultural communication skills, personality, language, or social skills. These could also include disabilities.

Inclusion is the achievement of a work environment where individuals are treated fairly and respectfully, have equal access to opportunities, and feel safe to fully contribute to the organization. Often, a significant aspect of inclusion is identifying and removing barriers that hinder equity and diversity.

As the Executive Assistant, you should be aware of your organization's EDI Strategy and ensure that the communication and messaging from the CAO's Office includes inclusive language and you are leading by example. It is important that all employees understand their role in EDI, their departments and teams, and the organization as a whole. This leadership starts with the senior management team and the appropriate training being provided to all staff. If EDI strategies are not already taking place in your organization, you should mention this to the CAO.

Analytical & Problem-Solving Skills

The Executive Assistant position entails several analytical skills including research, problem solving on the spot, data mining, performance metrics, brainstorming, interpreting data, strategic planning - just to name a few. It's so important that you use your analytical skills to solve the problem and find the answer because typically the client, whether it's a staff member, elected official or a citizen, expects a decision as there is no one higher to go to than the CAO's Office. Basically, you are the "troubleshooter" of all problems that come to the top office.

"It is rewarding to know that I am helping the organization and taking control of situations and problems without the CAO and just updating him on the solution. It is also great to assist the elected officials resolve problems for residents."

-Executive Assistant

Organizational Development & Time Management Skills

Developing good organizational skills is an investment that will provide you with benefits for years. To be successful means to be organized, and these are skills that you will require for your professional and personal life. This is one of the top skills of improving your productivity, time management and an overall increase in professional growth, especially when every day is different in the CAO's Office, and you never know what will transpire.

How much time do we waste in a day looking for items? If you can successfully implement time management strategies, then you can control your workload rather than being in "reaction" or "crisis mode".

"You may wish to keep a "to do list" which may change entirely by the end of the day but keep editing it as needed; have a good task tracking method like an excel spreadsheet, take notes, and create checklists and try to anticipate the needs of your boss".

-Executive Assistant

"You have to be very organized as tasks and demands are changing in government constantly. Try to stay one step ahead by planning the days and weeks ahead in the calendar".

-Executive Assistant

Task & Interruption Management

Interruptions are a fact of life. How we deal with them determines how well we get our things done. Interruptions can come from any direction when you work in the CAO's Office. How many times do you have your boss looking for something, somebody waiting to meet him/her for a scheduled appointment, but he/she is running late, the Mayor waiting to see him/her at the next available pause in the schedule, the phone ringing and you've already got somebody else on hold - just to name a few. Sound familiar? This is just a glimpse of the day in the life of an Executive Assistant.

It's important to develop some tactics that allow you to get work done while still responding to the communications of those around you. While it is perfectly acceptable to deflect an incoming call to voice mail, how would you do that with a person in front of you that is in your space? There is no way to pretend you're not there especially if you don't have a door or an office - which most Executive Assistants don't. Here are some tips to minimize person-to-person interruptions:

- Block out time on your calendar which might deter those who look at your calendar from stopping by.
- If you are lucky enough to have a door, close it.
- If you are at a reception desk or in a cubicle, put your headphones on and when the person doesn't get a response when speaking they will go away.
- It's okay to move away from your 'reception desk' and book a boardroom, work from home, put on your autoreply, explain you're on a deadline, or have designated backup available to address immediate inquiries (if they can't wait). If "the sky is falling" someone will find you!
- It's also okay to give yourself permission to be away from your desk, computer and phone and not feel guilty.

How do you deal with a demanding person via a device - phones, texts, e-mail, and instant messages? This one is easier to ignore because there isn't a physical body demanding your attention. It is recommended that you turn off all notifications and redirect them where possible and follow-up as soon as you can. If you do end up interacting with one of these interruptions, you can keep it brief.

Internal interruptions are often the most difficult to deflect because they are our own - you may be working on a project, and suddenly a random thought that's relevant to another issue pops into your head. Clearing your mind and your work surface of any distractions before working on what you need to get accomplished will help. Get those thoughts out of your head by writing them on a sticky note and getting back to work. All Executive Assistants have the most decorative desks with sticky notes of all colors and sizes to ensure nothing gets missed.

The goal is to handle interruptions by getting them all in one place. E-mail is also great because you can leave it in your inbox until you are ready to view it and deal with it. However, your customers, both internal and external, expect you to process their request in a timely fashion so its important to build trust by processing your e-mail regularly.

TIP: At the end of each day, or at the beginning of every morning, review your Inbox to ensure the priority items don't get missed.

Ability to Handle Sensitive Information With Discretion

Most of the information that is handled in the Office of the CAO is sensitive information and must be handled with discretion and confidentiality. It is your responsibility as the Executive Assistant to take the necessary steps to protect it. The way that information is stored will vary in each municipality, however following are some tips to take into consideration when protecting confidential information:

- For any information that is stored digitally it is important that you control access by using passwords, firewalls, and encryption. Also make sure that the passwords are both secure and changed regularly.
- Even though our world has gone virtual, there is still some paperwork that comes to the office. If you need to dispose of sensitive documents, be sure to shred them.
- If you must keep confidential documents, make sure you have a lockable storage cabinet that only a few select people have the key for. These cabinets should also be kept in a locked room.
- If you must deliver confidential documents, make sure you use a trusted courier service or have them delivered by someone that you trust within the organization. For digital documents, use a file sharing program.
- When confidential information is leaked, it is often the organization's own employees who are the biggest risk. Employees should be provided with the appropriate training on protecting confidential information. You may engage a third party to do this and/or involve your IT Department.

Project Management

Project management is an essential skill Executive Assistants already have in managing the day-to-day operations of the CAO's Office including the resources, timelines and working with management and internal teams to provide updates on issues and advancing them forward. You make sure that the right people are in the right place at the right time doing the right things on a proper schedule. You make sure everything is coming together to complete something, whether it's a meeting, event, or function.

How many times has the CAO assigned you as the Project Manager for a corporate initiative? Having project management skills including needs assessment tools and risk management is important to being successful in managing projects of any size. Your lead on any project will provide benefits throughout the organization because you work in the top boss' office, and it allows you to be seen as a respected member of the leadership team. Taking on projects also helps you grow within your career.

Following are some steps in managing a project provided by [TeamELS Executive Leadership Support](#):

- ① **Planning.** This is where you ask the questions and conduct a needs analysis to help avoid assumptions about the project. For example, where is the money coming from? What are the project requirements? What is the timeline and the scope?
- ② **Initiation.** This is where the project manager will set deliverables, activities, and scheduling for the project. You need to set the checkpoints/dates and dependencies here. This is also the stage where you need to meld stakeholder expectations into management objectives or tasks.
- ③ **Execution.** This is the phase where Executive Assistants are typically the most comfortable. When you are in a project manager role, it's important to recognize that you won't always be the executor. Instead, you are responsible for making sure others are carrying out the work. You're managing the project and not doing the project.
- ④ **Performance Monitoring and Cost Control.** Make sure what is supposed to be getting done is getting done and that someone is keeping an eye on the budget. This is the management piece of project management. Making sure that everyone is doing what they should be doing.
- ⑤ **Final Delivery, Close Out, and Review.** Once the project has been delivered, and everyone hopefully walks away happy, you need to ensure that you do the close out and review step. Most project managers and teams forget about this phase as you get thrown into the next project before you have a chance to complete it. It is where the most learning happens and is important that you evaluate how well you did your job, what went well, and what you would change the next time.

Also, the number one project management tool everyone should be using is Excel.

When you read the above-noted information on project management, I'm sure you reflected that you are already doing all of it: writing the reports, bringing the project in on budget, and following up with stakeholders and colleagues. You are the one that brings people together when things aren't getting done.



And when you're sitting at the table, participate. Don't be quiet. The more you are seen as a valuable part of the project management team, the more responsibility you get, and the more you learn.

So, if you haven't managed a project yet – ask your CAO if you can! Take the initiative (i.e., meet with your fellow Executive Assistants inside and outside the corporation and start your own project).

Event Coordination

Did you know that an “Event Planner” is listed as one of the top stressful jobs?

The Office of the CAO may lead some corporate events that you will take the charge of. This could be anything from employee retirements, employee appreciation events, to CAO Travelling Roadshows (when the CAO visits each Division and Department to meet all employees and provides them with a snapshot of the year's activities and the vision for the future).

Guidebook Blog provides some advice: [“How to Plan an Event: 10 Step Planning Guide”](#)

Office Procedures

Freedom of Information and Protection of Privacy (FOIP) / Right to Information and Protection of Privacy Act (RTIPPA)

The *Freedom of Information and Protection of Privacy* (FOIP Act) also called *Right to Information and Protection of Privacy Act* (RTIPPA) in some Provinces/Territories, applies to municipal governments/public bodies and outlines the rules under which the public can apply for and receive access to public records. There are certain limitations that shall exclude records from being accessible such as an exemption, confidentiality, or it may also be considered a frivolous request.

This is a responsibility that some Executive Assistants have along with the Office of the City Clerk and the Legal Department. Typically, each municipality has a legislated process that they follow wherein a form is completed or a letter is written outlining the request, as well a fee may be charged.

Upon receipt of the request, it will be reviewed and acknowledged. If it is a legitimate request an internal process will commence where typically the appropriate employee and/or Department will be contacted to get the information. The Records and IT Departments may also be involved to gather any necessary electronic files, reports, or records.

By-law Review and Development

By-laws are laws made by a municipality in accordance with municipal legislation and are passed by Council to govern municipal operations and service delivery.

Each municipality has procedures for passing a by-law that must be followed to make sure the process is transparent, and to give the by-law legal effect and be formally adopted by a resolution of Council.

Some Executive Assistants have the responsibility of preparing municipal by-laws. The Municipal and Provincial Planning Division of the Province of Prince Edward Island have designed a manual entitled [“Municipal By-law Processes Guidebook”](#) to help prepare municipal by-laws.

Systems and Process Management

You are the one that is closest to the processes in your office and the organization every day and every business process matters. Every process needs to be as efficient and effective as they can be. That's why your approach to process improvement and achieving process excellence are vital to the organization.

If you see a process in the CAO's Office or in another City Department or Division that could be streamlined or done differently, don't be timid to make some suggestions to that Director (also advising the CAO) that maybe you and their staff can work together on.

Municipal Policies & Procedures

Each municipality has policies, adopted by resolutions of Council, which set the direction and guidance for staff to deliver municipal services and enables goals and objectives to be met. Procedures are then developed to outline the steps or instructions on how to complete a task in the office.

It is important for you to review your municipality's Policies and Procedures Manual to become familiar with the legislation, policies, procedures, and general information.

Administrative Office Procedures

Administrative office procedures are not glamorous, but they are essential to the success of the Office of the CAO or any organization. A well-run office reduces any miscommunications and by making the administrative office a priority, you will establish clear policies and procedures which ensures your work environment runs smoothly. What type of office procedures do you already have in place? Do you have every aspect of your job documented especially for your back-up when they cover for you? This is all about knowledge transfer and making it easier for all employees to perform routine tasks without errors and to increase productivity. Depending on the size of your municipality you could have hundreds of procedures that are stored on an intranet site for all employees to access.

Your municipality may have a [Standard Operating Procedure \(SOP\) template](#) that you use such as this example from the City of Mississauga. Most templates will have the subject, a high-level overview of the activity, how often it takes place, the procedural steps, and any attachments to other documents that relate to the procedure such as a policy (set by Council) or a manual.

SOPs should be very detailed but brief and should be written so there is no room for confusion. Using diagrams and flowcharts to illustrate a process can also be advantageous.

Lastly, the most important part of having a SOP system is to keep it up to date at all times.

Records Management

Records Management is often an overlooked responsibility; however, this task is becoming more vital every day and is necessary in fulfilling important legal requirements and providing liability protection, but also increasing efficiency and productivity for the entire organization. Municipalities must find a way to manage, store and organize their records whether your population is 500 or 500,000. If your records are lost or destroyed there is nowhere to go to purchase a replacement.

Some municipalities have a Records Management Officer that is responsible for the compliance paperwork and preserving permanent and essential local government records and disseminating information regarding records management to the organization. While other organizations rely on the Executive Assistants in each Department to be responsible for their own records.

Every municipality will also have standards for their specific systems including electronic information, scanning, and managing e-mail, the operation of the archives, review of retention schedules, personal information banks, and vital records. Court orders, tax records and minutes of City Council meetings are just a few examples of important documents. If you do have a Records Management Officer check with them to ensure that you are filing new records and managing your e-mail correctly, and when they can be destroyed.

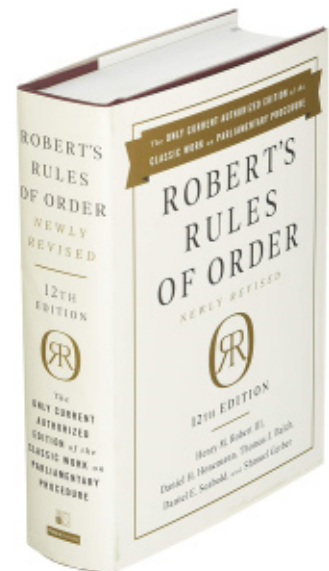
Ensure that you keep up to date and understand the rules and processes for records retention especially on fiscal, historical, administrative, and legal files. There are also consequences of keeping things too long such as storage costs (physical and electronic space), or not keeping them long enough, time spent on retrieval, the responsibility for protecting records, and the legal risk. It is important to be able to find e-mails or records in a timely manner for your boss so if you don't currently have a beneficial records management program for your office you should look into one.

TIP: Being up to date on your Corporate Records Policy with respect to your naming policy, password protection, retention, and where to find electronic files is essential to your productivity.

Council Management

Parliamentary Process/Rules of Order of Council Meetings

Councils have the authority to govern municipalities and some Executive Assistants are involved in the Council meetings from start to finish. Regardless of your role, it is advantageous to become familiar with your municipalities Procedural Bylaw and Rules of Order. For example, some Councils use the **Robert's Rules of Order** which is a recognized guide to ensure that meetings are orderly and fairly conducted. This book on parliamentary procedure outlines the most important rules including motions, points of order, nominations, elections, appointments, appeals, votes, debate, and amendments - just to name a few. Having knowledge about how Council operates will help you with your role with the CAO and/or Mayor's Office.



Meetings of Council are, by far, the most highly visible part of elected officials and are what the public sees and hears and the way in which meetings are conducted are extremely important to the success of the community.

Because the CAO's Office is closely tied with the Mayor and City Clerk's Office, it is advantageous for the Executive Assistant to know the process of Agenda items for a City Council meeting, the rules of order for the Council meetings, the follow-up process, etc.

A review of your municipality's Procedural By-law (conduct at meetings, public participation, voting on resolutions, how to ask questions, when to speak to a topic, etc.), Consent Agendas, Rules of Engagement (what constitutes a quorum, Conflict of Interest, Code of Conduct, Code of Ethics), and Motions of Council should also be reviewed.

It may also be a good idea to meet with the City Clerk to become familiar with the Council meeting process and the Planning Advisory Committee process.

Even if you don't attend Council meetings, it's important to know the language when you hear your boss, colleagues or elected officials talking.

Assistance with Municipal Elections

In some Provinces and Territories, the municipality oversees the administration of the municipal election process.

Typically, the City Clerk is often responsible for overseeing the administration of the election - staff appointed, polling stations set up, and the correct procedures are followed. Council also includes a budget for the municipal election that includes supplies, human resources, training costs, and the rental of facilities for polling stations.

In addition to your regular duties as the Executive Assistant, you may be asked to take on additional tasks to assist in the municipal election.

Council Changeover

Council changeover happens any time there is an election or by-election. With municipal elections mostly occurring every four years the probability of change is high. Even if all the same individuals are voted in, each term brings a new Council. With each election, the culture of Council may differ, the politics may vary, and return Councillors may become more confident in their role. Return Councillors sometimes feel more comfortable "flexing their muscle" due to a perceived authority or a desire to be more visible within the community. They could also have their eyes set on being the Head of Council (or a Committee Chair) for the next term and therefore push an agenda to try to make themselves more successful and well-viewed within the community.

Council changes also bring different priorities and different approaches. CAOs need to be able to adapt and immediately start building a relationship with the new Council. If the CAO sees signs that there could be a significant departure from how he/she and the old Council did business, they need to adjust their style quickly - so they are not at risk with the new Council. That said, sometimes it is better to accept when the writing is on the wall and prepare to begin a new chapter elsewhere. Developing the ability to read an election for these signs is a fundamental part of building political acumen as a CAO and you, as the Executive Assistant, can help.

TIP: When preparing to work with newly elected officials, pay attention to the candidate's election materials to understand their priorities. While these priorities may change after the election, it helps to understand the newly elected Councillor's motivations and will provide insights as to whether the community supports his or her initiatives.

As the Executive Assistant, you should be politically astute and watching the media prior to the election to collect information for the CAO on the elected officials' platforms. This will help to prepare the CAO for what to expect with the new Council.

Council Orientation

CAMA is pleased to provide a **Council Orientation Toolkit** that is meant to be a high-level guide to provide municipalities with some helpful hints in building a successful Council Orientation. The CAO's Office plays a key role in the Council Orientation by assisting the City Clerk's Office; however, in smaller municipalities it may be the CAO's responsibility as he/she also holds the title of City Clerk.

In the Toolkit, you will find a checklist for Staff or Incoming Elected Officials and Outgoing Elected Officials, the Swearing-In Ceremony, and the Council Orientation.



The CAO is typically heavily involved in the Council Orientation process as when a new Council is formed it is very unlikely that everybody knows each other, even in the smaller communities. It is important to provide them with an informal opportunity to gel but also to have the opportunity for the CAO to get to know them. As the first activity of your Council Orientation, it is suggested that the CAO could host a meet and greet at City Hall for Council and possibly also invite some members of the senior management team. This networking event should be intimate and not too overwhelming and one where the CAO can provide some welcoming remarks. This is where you can assist in organizing this event.

This is a pivotal time for the CAO and the new Council as it's a time to build trust and respect from the get-go. If your CAO doesn't have a teambuilding exercise set up for the new Council, you could recommend it. There are some examples of team building exercises in the [Council Orientation Toolkit](#) that you may wish to suggest.

"We need better alignment of Council's role and an understanding of how it coincides with the Executive Assistant role. For example, Council does not necessarily know or understand their calendars, how to respond to e-mails, and answer a Doodle Poll. This causes a significant effort for the Executive Assistant. During Council Orientation, more emphasis should be placed on this relationship."

-Executive Assistant

Managing Staff-Council Relationships

The other significant role that the CAO can play when there is new Council is the **staff orientation** which should be led by the CAO. As stated in the [CAMA Council Orientation Toolkit](#), interaction amongst Council and Staff is a subject matter that requires clear direction and lines of communication from the CAO. This is often more challenging in smaller municipalities than it is in larger municipalities with more complex organizational structures. Without clear lines of communication and leadership, staff communication with Council can become a challenge for the CAO.

It is imperative that the CAO work with and provide leadership to the senior management team to make sure they have a good understanding of political acumen and the role of Council versus that of management. Namely, the role of Council in making decisions versus the role of Administration in providing subject matter expertise, and professional advice. Mentorship on this topic should be ongoing to build the overall competency of the municipal organization. [CAMA's Political Acumen Toolkit](#) has a PowerPoint Presentation on the Staff-Council relationship that you can recommend to your CAO and set up a meeting with not only senior management, but all staff either in-person or virtually.

As well, the CAO and the Executive Assistant to the CAO should always lead by example. While we are all human and prone to venting about frustrating situations, you have a duty to reflect Council in a positive light to staff. While you should certainly never speak negatively about Council or any particular Council member publicly, the same rule applies within the organization. Showing staff how to manage frustrations with Council professionally helps ensure they exhibit the same level of competence and political acuity in their Council interactions.

More information on working with staff to provide information to Council can be found in the [Council Meetings section](#) of the Political Acumen Toolkit.

It is also recommended that senior staff take part in an orientation session that includes the role of Council and staff, the legislation under which they operate (By-laws, Conflict of Interest, Code of Conduct, etc.), how meetings are conducted, etc. This orientation would also focus on providing staff with a better understanding of the pressures that elected officials face in this world of social media, and the difficult community issues that they deal with.

Staff should also be reminded that during the election campaigns, they should treat all candidates the same. For example, if a request is received by one individual it should be sent to all.

Managing Staff-Council Requests

It is also important for the CAO to support staff in their relationship with Council by helping to manage Council requests. The CAO needs to be cautious about overcommitting both their own and staff's time and ability to respond to these requests. When a CAO makes a commitment to Council, they need to be able to deliver and if not, inform Council as soon as possible with the reason for the delay. Be upfront, transparent, and open. Do not hide anything.

A best practice includes establishing a protocol for Council inquires that includes a timeline for response. One strategy used by many municipalities to manage Council demands of staff time is the requirement for Council to make a motion whenever a request is being made. This is particularly relevant if the request represents a substantive amount of work. By requiring a motion, the CAO ensures it is Council as a whole soliciting the efforts of staff and one-off requests are minimized.

Another approach for managing Council requests is to use the strategic plan as a reference point when making commitments to Council. The strategic plan should act as the roadmap for your municipality's efforts. If a request does not align with the strategic direction of the organization, it may not be required and therefore the strategic plan can provide the rationale to deny unnecessary requests.

As the Executive Assistant to the CAO, it is important that you are kept in the loop on all Council requests to ensure that the timelines are met and information is communicated appropriately.

"My Executive Assistant helps me execute and track Council's requested actions. She provides me with reminders of looming deadlines and helps me schedule my time accordingly. She also assists Councillors with approved Council tasks and advises me when individual Councillor requests are deviating from approved Council actions."

-Chief Administrative Officer

Record of Council Reports

It may be a best practice in your municipality for the City Clerk's Office to keep a record of Council reports that have been considered by Council, will be on the Agenda, and those that require follow-up from City Staff. It may also be advantageous for you to meet with the City Clerk following the Council meeting to determine if your boss has any follow-up items or ask them to always copy you on the e-mail. This will ensure that you can keep a checklist for the CAO to ensure that the deadlines are met for the reports, and Council receives the information in a timely manner and all promises are kept.

Leadership Skills

What do Executive Assistants Do? Whatever It Takes!

Executive Assistants to the CAO offer support to the head office within the municipality. You represent the City, your boss, manage projects, and guide the operation of the CAO's office to achieve the same goal or vision. While this job involves many "office skills" which are outlined in this document, leadership skills are also crucial to this position.

Below are some leadership skills to help you become better at your role as Executive Assistant. You should look at your current skills and identify what you are good at and what you need to improve. The best way to learn leadership is by doing - consider taking on more projects or duties and getting out of your comfort zone. With more practice, your boss will trust you with more leadership.

Executive Assistants wear many hats and having good leadership skills can help you excel in your role. You can also enroll in a leadership program or attend on-line webinars.

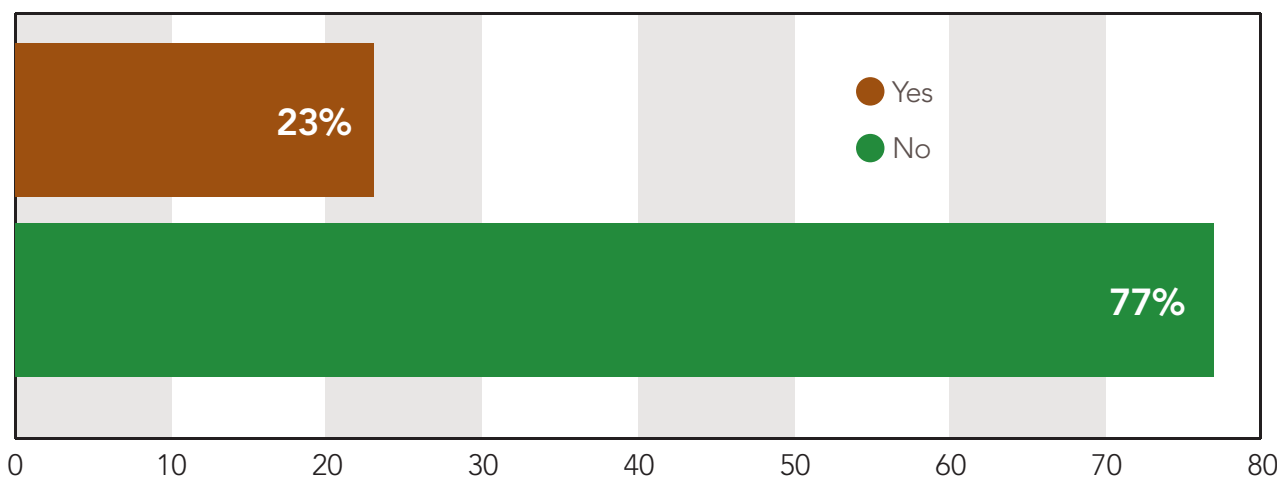
"I would advise to be open to learn as much as you can and don't be afraid to ask questions. Growth is so important. You will not 'make it to the top' overnight so soak up and absorb all the information you can."

-Executive Assistant

Finding a Mentor

Only 23% of the Executive Assistant survey respondents currently have a mentor.

Q14 Do you currently have a mentor?



Mentorship, formal or informal, is a critical component of professional growth. As a mentor, you can play a role in helping fellow Executive Assistants advance in their career, and as a mentee you can also learn from your colleagues as part of your career development. Learning from those around us who have real-life expertise gained through years of hands-on experience is not only valuable but essential to advancing our career pursuits. It is through mentorship that we all learn skills from other's experiences that can't be acquired through books. You will also learn by building important networks locally or across the country.

CAMA's Political Acumen Toolkit has a chapter on mentorship that will give you some tools that you can use to build strong mentor-mentee relationships. Is there another Executive Assistant in local government in Canada that you can connect with and create a relationship that you can learn from each other?

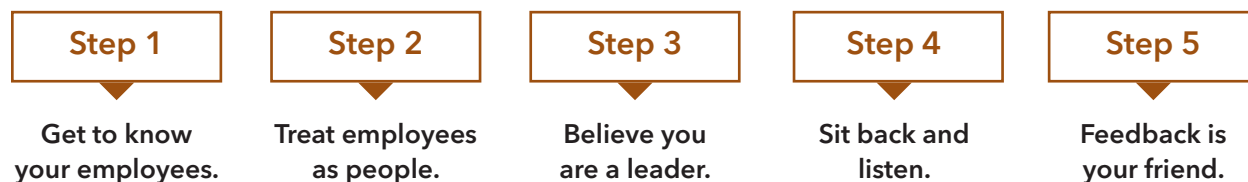
"Always be a role model and mentor for other Executive Assistants in the organization – you can learn from each other."

-Executive Assistant

Supervisory Skills

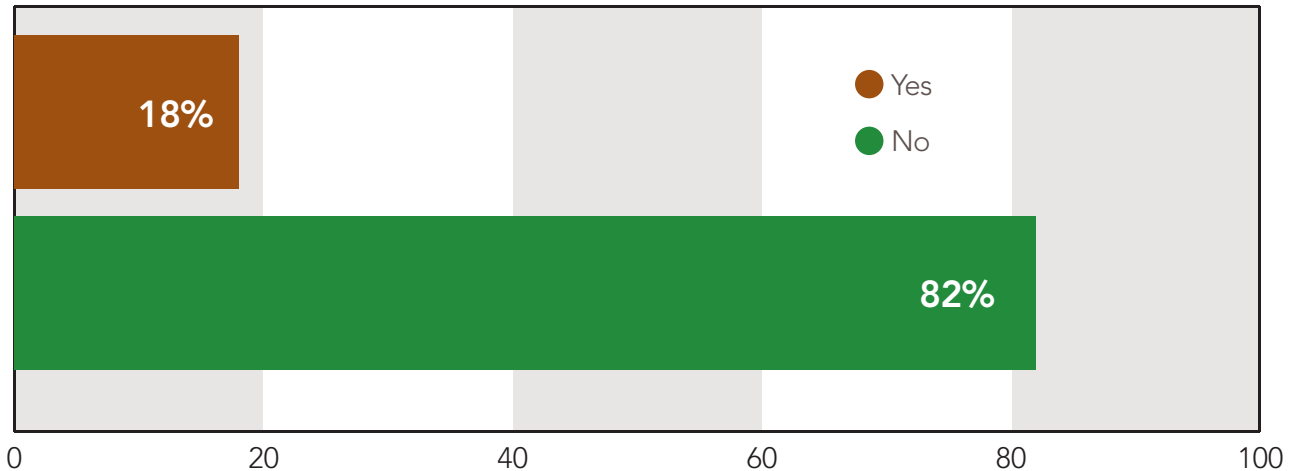
Some Executive Assistants are also supervisors to other administrative staff in the CAO's Office or other municipal Departments. Whether you are managing two or ten people, being a supervisor is quite a big job. It's a supervisor's responsibility to delegate tasks to team members, direct the workflow, training, terminations, and ensure all the operations are running smoothly.

Perkbox has an informative [article](#) on the top five steps to being a good supervisor. Below is an executive summary.



Eighteen percent (18%) of survey respondents supervise between one and seven employees with the average number of employees being 3.

Q11 In your current role, do you supervise any other employees?



Attention to Detail

"It's All In The Details" is a common phrase used. Because you work in the Office of the CAO it is important that you deliver **high quality and accurate work**. Your job is very detail oriented as you must always notice small mistakes and be as error free as it is reasonable to expect.

Employers value employees with good attention-to-detail because they can be trusted to produce high-quality and consistent work. This means that you spot important information when preparing for tasks or evaluating an office situation.

To improve your attention-to-detail skills you may want to consider the following:

- **Stick to a schedule** and start work on time as this gives you time to work through the tasks you have planned for the day - even though you know there will be several unplanned interruptions. When you aren't rushed you don't make as many mistakes.
- **Take Breaks.** It's not healthy to sit at your desk for hours on end - take some brief breaks.
- **Listen.** When you are having a conversation with your boss, or your colleagues make sure you give them your full attention and make notes afterwards, so you don't forget the details. Who has a million sticky-notes on their desks!!!??? Follow-up with a short e-mail capturing the key points - an extra check-in does not hurt, to ensure you heard it correctly (or they communicated their ask clearly).
- **Double-check.** Always, always double-check your work; get another set of eyes on your work and ask a fellow Executive Assistant or colleague to proofread.
- **Minimize distractions.** If you can find a quiet place to work where you won't be disturbed, do it. Focus is a key to producing high-quality work.
- **Planning.** One of the many strengths of an effective Executive Assistant is to plan your day to ensure tasks are not missed.
- **Take a Break from Technology.** When concentrating on a major task put your phone or other technology away.

"Triple check your work before it goes out, especially when it is being published for all to see. Take your time, it's very important to get it right."

-Executive Assistant



Did You Know?

An organized person is naturally neat, punctual, and detailed in their personal and professional life. Everything is planned and as efficient as possible. Some have these leadership skills naturally while others might have to work to develop them. Organization gives you a greater sense of control to be resilient when curve balls are thrown your way - at home or at work.

Assertiveness & Self-Confidence

Assertiveness and self-confidence are two skills that are critical in the success of an Executive Assistant. If you don't feel worthy or confident in your self-worth when communicating with others, it can be difficult in expressing yourself and reflect on the CAO's Office.

We all have times when we lack confidence and have low self-esteem and sometimes it's because we set impossibly high standards for ourselves. It's important to recognize what you're good at, build positive relationships by spending time with people that appreciate you, be kind to yourself at times when you feel like being self-critical, learn to be assertive by watching other people who are, and finally, start saying "no". If we always say yes especially when we don't want to, we become overburdened and resentful.

Giving yourself a challenge is also healthy for your self-esteem, so take on some new things in the office or throughout the corporation.

"Confidence comes from competence. It takes time, but the more you build up your competencies, the more confidence you will have in your role."

-Executive Assistant

"Be confident. Your position matters more than you are told or valued."

-Executive Assistant

Creativity

Having the ability to be creative and "think outside the box" will allow you to explore new paths to help make the organization better. It is critical to look beyond what is visible and consider new ideas. Creativity places a big role in building a positive work environment and will help in opportunities for growth, engagement, and productivity. Always be open in the CAO's Office to every employee being confident in expressing their ideas. Organizations have had to be more creative in recent years to operate during the pandemic and do more with less. Creativity starts at the top!

Tenacity

The definition of tenacity in the dictionary states that "fierce blend of determination, persistence, and grit. For leaders and their organizations, it's the trait that means the difference between failure and success, and that takes their teams from doing alright to thriving". This is also the definition of an effective Executive Assistant - we never give up when the going gets tough. Having tenacity gives you the confidence and determination to find a way, even if you currently don't know how. We all have our own challenges and learnings that we can share with each other, and these are sometimes the best personal growth moments in our career.

Be that leader for the CAO and the office that always finds a way to make something happen.

Adaptation and Agility

There aren't many things guaranteed in life - but change is one of them. Your job as an Executive Assistant requires adaptability to react effectively to a variety of situations and different personalities on any one day, especially during the pandemic which made you become a better problem solver, push yourself out of your comfort zone and, no doubt embrace the change with your many skill sets.

Even small changes like an upgrade to new software or a desk can cause disruptions. Often, changes in the office are out of your control but what you can control is how you react to them. It's important to be the leader that can guide others with processes that allow them to efficiently deal with different situations as they arise during the challenging times. How many times have you navigated through a problem and your boss doesn't even know it - or have to know it?

Having an adaptable personality allows you to see the full picture when facing a challenge and responding to any situation.

When you become more adaptable at work, and at home, you will build resilience, and remain calm and in control, which will set you apart as a leader, and boost your productivity.

"Be flexible and be open to learning and adapt to the context and circumstances of your work environment."

-Chief Administrative Officer

Accountability

Accountability in the workplace is taking responsibility for your performance and behaviour and continuing to manage that responsibility over time. An Executive Assistant is at the forefront of building an accountable workplace. This requires taking control of your own success, managing your workload, your career, your relationship with your boss and the other senior managers, and staff in the entire corporation.

This is a very important topic of discussion for the Executive Assistant to the CAO which relates to the "Delegation of Authority" chapter of this guide. Sometimes we see ourselves as "just the assistant" and that we don't really have the authority to question things to our boss or make decisions. Sometimes we are known as the "secretary" or "support staff" which doesn't help because it suggests that we are there to only offer support and do the things we are told to do and not much more. The role of the Executive Assistant is changing and there are more opportunities for assistants than ever before, and it is up to us to be accountable for our own success.

Practically Perfect PA talks about the benefits of accountability. Here is an executive summary of the tips they feature in the article:

When you **take control of your own workload**, accept accountability for your actions and take real responsibility for what you are tasked with, well, the benefits are huge. Here are just a few differences you will find in your behaviour once you start to think about accountability within your role:

You will set yourself goals.

You will recognize that you are the expert at what you do.

You will recognize the power that you hold within your organisation.

Be results-focused. With everything you do, think to yourself what are the goals here, what are my objectives, what do I want to achieve and what are the useful outcomes. If you find you spend ages on a task that is not business critical or adds value, because you are accountable for that task, you can adjust the process and make it more effective.

What areas can you influence?

You may not have direct responsibility for a whole load of tasks, but you do influence them. Again, if it helps, make a list. A task that springs to mind is working with suppliers. You are not the person who necessarily signs the contracts for new suppliers, but you probably use them more than most, so again, take some responsibility for this relationship. Let your CAO know if a supplier isn't quite working. If they are great, let other people in your organization know so they can benefit too.

Be honest about what you are doing and where you are with tasks.

Being accountable for your work doesn't just mean that you control the good stuff. It also means you are honest when things aren't quite working. If you decide to take more ownership of your work, you'll have to put your hand up when you might fall behind with deadlines or struggle with something. This isn't necessarily a bad thing. If you are working on projects that push and challenge you, there will be times you need to seek advice from your CAO (just like any other member of staff).

Remember, you have to be accountable for all of your work. If you take on new tasks, remember that you must keep up to your day-to-day tasks which is primarily looking after your boss - the CAO. Don't let the ball drop on those important things!

What training do you need to be in total control of your work? Don't be afraid to ask for training if there is any aspect of your work you need help with.

Last but not least. Accountability has to begin with you. It is such an important competency for assistants, and it is a brilliant competency to have as part of your career development plan - you should discuss it further with your CAO.

Self-Promotion/Personal Branding

Creating your personal brand is one of the most important characteristics of an Executive Assistant. You are never going to be like your predecessor or your successor. You need to identify your own characteristics, skills, and strengths as an individual. This is a mix of how you present yourself and how others see you. Always be aware of how you are viewed by your colleagues, and you can define how others see you. You must protect and live your own brand.

Always be Helpful

You always want to be seen as having a bias toward saying “Yes” as long as you aren’t breaking any policies or rules. You don’t want to be seen as the roadblock to staff, Council or the public. Typically, when you receive a call from the public they have already talked to another Department and are dissatisfied with their response so they “go to the top”. Sometimes the request is political from the Mayor and/or Councillor, however you should put yourself in their shoes and think about the pressures they feel from citizens, especially with social media. This is a “grey area” that Executive Assistants get very good at.

Professionalism

Professionalism in the Executive Assistant to the CAO role should not be understated and should be demonstrated through excellence in knowledge, judgement, and behaviour. You are watched throughout the organization and in the public. You must consistently demonstrate respect, honesty, integrity, equity, and confidentiality of both staff and residents.

“Organizations are complex, as the Executive Assistant you represent the executive team – always be aware of your words and actions. Your role is seen to hold power and influence, and colleagues in the organization may read into the words you share. Due to the access to information you will have, people may ask you questions – always be aware of what you can and cannot share, understand that confidentiality and professionalism is always required.”

-Chief Administrative Officer

“Always be respectful and professional, even in tumultuous situations. You will need many ‘friends’ (assistance) in your daily journey.”

-Executive Assistant

Dressing professionally also helps you present a positive, professional image of you and your organization. Even if you dress casually, make sure you look neat and put together which will improve the reception you receive.

Corporate Culture

Your role as the Executive Assistant to the CAO includes taking on a more prominent role in developing the corporate culture and a healthy morale since you are essentially the glue that holds the team together. One of the best things to do is to plan an off-site event so that all employees can connect with their colleagues from other Departments. This, in time, will build trust, especially when the event is planned with the personal touch from the CAO's Office, and will provide an opportunity for the management team and staff to get to know each other on a more personal level.

As previously noted, you should never be afraid to ask to do things that are outside of your job description. You should always take the risk and ask your boss the question or you will never get the answer - whether it's yes or no. If you have an idea that you would like to pursue, speak to your boss, and see how he/she feels about it. But don't just present the idea, go above and beyond, and propose a budget (if the project requires one) and have a plan. Most leaders will see this as a positive.

Also, a "Happy Corporate Culture" is the way you talk about your employer when your boss is not around. There is nothing positive about gossip and office politics.

Ask and Take on More Responsibilities

As you progress in your career as an Executive Assistant, you may want to take on more responsibilities, either in the CAO's Office or corporately throughout the organization, which also shows that you are ready to advance in your role.

But why would you want to take on more responsibility when you are stretched already with a very busy job? It will expose you to more career opportunities for a promotion; you can learn new skills and experience; you may be able to advance the CAO's goals; and most importantly, you can work with more people throughout the organization.

Offer to help one of your colleagues with their work or take on that task that no one wants (there's lots of those). This will show you are an asset in your own role but would like more opportunities. It's these extra efforts that get noticed and show leadership.

TIP: The job you start your career with is sometimes the best learning opportunity because you may wear many different hats, are pulled in many directions, but you figure out how to land on your feet. Never ever tell somebody "how busy you are."

"Never consider a task 'too small'. Whether it's taking out the garbage, emptying the office recyclables, or ordering the pens – good Executive Assistants will happily carry out the task for the good of the organization."

-Executive Assistant

How to Take Your Role to the Next Level

Do you want to be an Executive Assistant to the CAO forever? Once you learn how to be an Executive Assistant to the CAO and have several years in the job, you may be wondering what's next. Sometimes Executive Assistants to the CAO become the Assistant to even higher-level executives in the public or private industry, or they may stay within the municipal organization to become a Manager, Director, or perhaps the CAO someday. You should never limit your abilities, know that you can always achieve whatever you would like, and dream big.

Discuss your career aspirations with your boss and map out a professional development training plan to help meet your goals. You may also really enjoy your job and be content being in your current role, and that is okay as well.

Case Study: My Boss Says, "Do You Want to be an Executive Assistant Forever?"

I am fortunate to report directly to a CAO who is invested in my career development and advancement. Although the question "Do you want to be an Executive Assistant forever?" has never been posed, my boss recognizes my potential, and wants to help me further my career; even though that means that I will potentially advance beyond my current role of Executive Assistant.

One of the ways in which my CAO does this is by creating an open environment in which I feel I am able to communicate my thoughts on how I see my current role progressing, and roles I might progress to in the future. We have regular catch ups to discuss my professional progress and career path. This open communication provides us both with the chance to discuss the steps necessary for me to fulfil my potential.

My CAO also encourages me to challenge myself by taking on additional responsibilities within the organization that are relevant to my career goals. Allowing me to take on tasks outside of my comfort zone demonstrates to me that my CAO supports my development and is willing to help me get there.

Another way in which my career progression is supported is the availability of training opportunities relevant to my career goals. Although there is not an endless training budget, my CAO is supportive of me taking courses (when financially possible) and is supportive of the fact that it may take me away from my day-to-day tasks for a period of time.

When promotional opportunities come up within our organization that are in line with my career aspirations, my CAO provides encouragement and support for me to pursue those opportunities.

The open communication and support I receive from my CAO is invaluable. This working relationship has taught me that having a superior who I respect and is invested in my career is critical to my success!

Submitted by an Executive Assistant

Professional Development

Building your skills and experience to become a great Executive Assistant is something to aspire to. Always keep learning and expanding your skill set whether it's from a mentor, your colleagues, or courses. Also, don't underestimate the power of experience as most lessons are learned on the job. You'll not only be able to work in partnership with the CAO, be a successful leader and mentor, but you'll become a top expert in your field.

Executive Assistants recommended that training on the following topics would help improve their skills:

- **Executive Assistant Courses.** General administration, business administration, office management, and business acumen.
- **Leadership Training.** Managerial courses, the art of supervision, how to think outside the box and how to delegate to others, confidence building, stress management, critical thinking, emotional intelligence, and developing resilience during times of change.
- **Communication.** Customer service, public speaking, communicating with authority, effective listening, social media, decision making, and writing.
- **Project Management.** An Executive Assistant manages projects every day on behalf of the CAO. This is a great skill to have.
- **Relationships.** Relationship building with others in the organization, dealing with difficult people, conflict management, having difficult conversations, assertiveness training, and diffusing difficult situations.
- **Time Management.** Training courses on how to get the many tasks done in a more efficient way.
- **Minute Taking.** Having the ability to take minutes confidently for Council or senior leadership meetings is important.
- **Technology.** MS Word, Excel, PowerPoint, Microsoft Suite, Office 365, social media platforms, and website training.
- **Records Management.** Digital record keeping and records management training.
- **Writing.** Grant writing, report and letter writing, and presentation skills.
- **Organizational Skills.** Task management and how to manage time and priorities, structure, discipline, and multi-tasking.
- **Human Resources.** Organizational behaviour, change management and introduction to human resources courses.
- **Event Planning.** A large part of an Executive Assistant's job is in planning events so a course might be helpful.
- **Local Government.** Understanding by-laws and policies, Diversity, Equity & Inclusion, NACLA courses, political acumen and professionalism with Council, *Municipal Act*, Roberts Rules of Order/parliamentary procedures, Council meeting regulations, *Freedom of Information and Protection of Privacy*, zoning/planning and development, budgeting, strategic planning, policy development, local government procedure training, general legal information, and learning about different levels of government.

As previously noted, one of the most important areas that Executive Assistants need to stay ahead of the curve on is with respect to information technology, so they can troubleshoot for the boss when they need it. Having a strong handle on the latest trends is also critical as new programs are rolled out throughout the organization. You need to be trained first since you will most likely be the personal IT Assistant in your office.

CAMA is pleased to provide a [List of Executive Assistant Programs and Training in Canada](#).

Creating Personal Goals

We have touched on creating your professional goals, now let's talk about setting your personal goals, which is just as important.

Setting goals for yourself is important as it gives you time to think about what you want in life and gives you a sense of purpose. It helps take a step back and get some perspective on what's important in life.

When setting your personal goals, you should consider your passions and decide what inspires you and what your values are. Goals should be within your control and should not be dependent on other people. In the end, they also need to be realistic, so they are attainable.

Collaboration With Other Departments

The Office of the CAO is sometimes referred to as "The Penthouse", "The Glass Palace", or the "Centre of the Universe" - however it is very important that you are the face of the office and ensure that it is welcoming to all as it can be intimidating to some.

Collaboration improves the way that the senior management teams work together, and problem solves. This, in turn, leads to improved communication. It's important that you listen and learn from the other Directors so you can help each other.

You also have to be sympathetic to those that approach the office, but you have to gauge the importance of whether they need to see the CAO right away or if it can wait.

Things that Executive Assistants can suggest to their CAO with respect to communicating with the staff:

- Regular updates either virtually or in person. These can be in the form of "Town Halls" or "CAO Roadshows", an e-mail message, or CAO Livestream. What matters is that there is a cadence to the communication and that the CAO is creating a vision, and this vision is communicated to all staff often.
- You can help your CAO write a weekly blog or update.
- If the CAO doesn't already make an effort to visit the various work locations and staff (outside of City Hall), this should be a priority. The CAO should be seen, and staff will then be able to put a face to the name. You can be proactive and ensure this also happens by reaching out to Department Heads and Division Managers to pre-arrange these visits.

The art of a handwritten note could be one of the most impactful ways to maximize a CAO's reach especially to employees. If an employee has gone over and above with their job, a note from the CAO and perhaps a gift certificate congratulating them gets noticed and sends a supportive message from the top office.

The Executive Assistant should also write thank you notes to individuals that went above and beyond for their office. The more relationships that an Executive Assistant is able to create will only help their CAO. A sincere gesture, expecting nothing in return, will be returned tenfold.

Humility

The best Executive Assistants run the show behind the scenes without stepping into the spotlight. Humility is one of the most important traits for Executive Assistants and pairing high performance with humbleness is no easy task, yet it is absolutely necessary. As a public servant, it is important to stay humble because having humility not only helps you develop a kinder approach to interacting with others, but it also influences how you perceive yourself and the world around you.

We are all human and we all make mistakes. A great way to show humility is accepting and admitting to past mistakes and using these mistakes as teachable moments and learning from them.

All of us want to be right in every argument and look good in every situation but great leaders recognize that they don't always get it right, and you - the Executive Assistant, are a great leader.

Always be humble and kind because that's who you are as the gatekeeper and the glue that holds everyone together.

“One of the most rewarding aspects of being an Executive Assistant is doing the behind the scenes work and then seeing great pay off when big moves are made, and Council's vision and strategies come to fruition.”

-Executive Assistant

The Ability to Manage up

Managing your relationship with your boss should not be intimidating, but it may be, especially when you first start your job working for the top boss - the CAO. You need to develop a productive working rapport with the CAO learning their management, leadership, and communication style.

BetterUp describes how to **“Succeed at work by learning how to manage up”**. “Every relationship, even one defined by power, such as boss and staff member, is still a relationship. It demands input from both parties and a healthy degree of give-and-take. In this case, the boss manages, and the staff member manages up.”

Most employees feel somewhat intimidated by the idea of managing up, particularly with a senior boss or difficult boss. This is the time to put on your investigative or research hat and get curious about the world from their perspective.

It sounds like a cliché, but the foundational question of, “What’s in it for them?” will serve you well in this relationship. Getting into the boss’ shoes and viewing the world a little from their perspective can begin to answer critical questions.

Questions to ask yourself (or your boss) include:

- What is top-of-mind right now?
- How is your performance measured by Council - what projects in the Strategic Plan or workplan need to be met this quarter?
- What would make your life easier?
- What keeps you awake at night?
- How would you like to be supported?
- What's your definition of success?
- What do you consider urgent versus non-urgent?
- If I have any feedback, how would you prefer to receive it? In-person, an e-mail or text, over the phone, or during a video call?

“One of my biggest challenges as an Executive Assistant is understanding when it’s appropriate to take the lead or when I need to wait for direction. Also, speaking up when the boss is incorrect – this can be tricky.”

-Executive Assistant

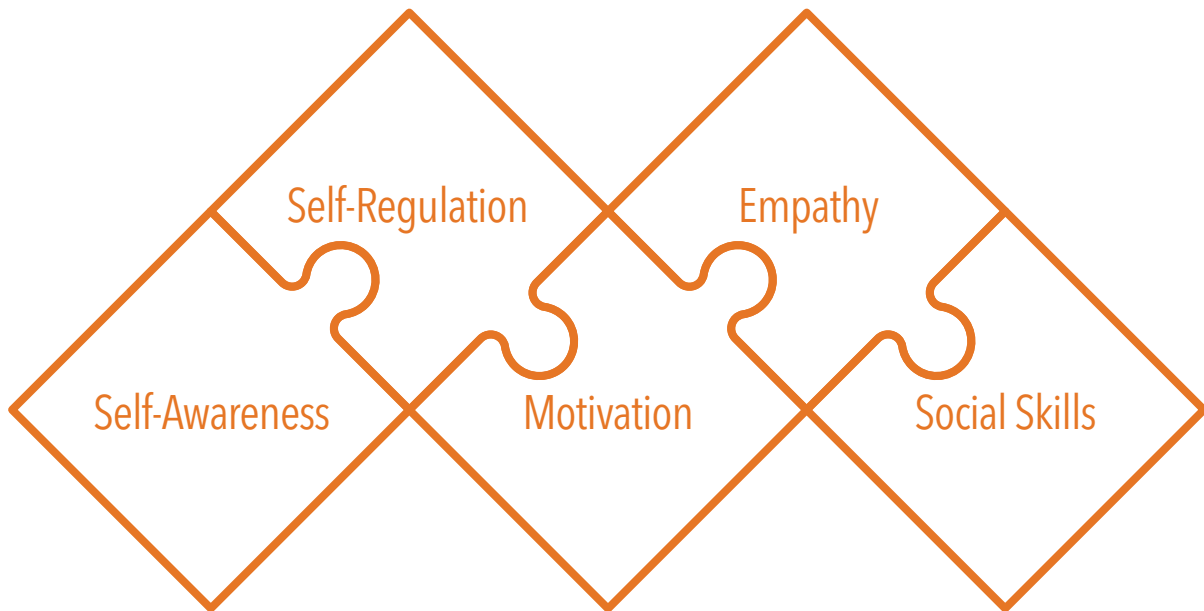
Emotional Intelligence

All Executive Assistants must have emotional intelligence, which is a skill that can be learned through practice and development. Emotional intelligence “is the ability to understand and manage both your own emotions, and those of the people around you”.

Sometimes, because of your position, you can approach people easily and more frequently and be known in your organization as someone who is always on the lookout for what is right with people. It promotes goodwill and is good for the entire team.

“Make sure you have an outlet to handle frustration, so it doesn’t manifest at work. Do regular self-evaluation – be mindful of your emotional intelligence and your delivery to others. Work on improving this to improve relationships. It will take you a lot further than how good you are with excel, etc.”

-Executive Assistant



(The picture shows the five components of Emotional Intelligence according to Daniel Goleman)

Julia Schmidt, Award-winner PA of the Year Scandinavia 2017, C-Suite Executive Assistant, shares the following tips to make you an Emotionally Intelligent Executive Assistant:

10 Tips to Make You an Emotionally Intelligent Executive Assistant

- ① Recognize how people around you are feeling.
- ② Focus on positive emotions.
- ③ List your strengths and weaknesses.
- ④ Look at situations from other people's perspective.
- ⑤ Be calm and control all negative emotions.
- ⑥ Be a great communicator and help your executive in also becoming one.
- ⑦ See each day as a big opportunity to accomplish your goals and your company's goals.
- ⑧ Give constructive feedback to people (which includes your CAO).
- ⑨ Look for the good in others and help your executive and team to do the same.
- ⑩ Motivate yourself by setting SMART goals and working consistently towards them.

Strategic Thinking

Over the last few years there has been an enormous shift in the role of the Executive Assistant. Due to the advancement of technology and project management tools, jobs that took hours now take minutes. Gone are the days of typewriters and hand delivering reports. Executive Assistants are now able to focus less on the administrative support (which is still very important) and more on providing strategic, top-level support to their CAOs. An informed Executive Assistant is a strategic Executive Assistant.

You should always be mindful of facilitating the following for the CAO:

- Proactively identifying opportunities for improved efficiencies. Every improvement in efficiency that an Executive Assistant creates for the CAO has a significant impact on the corporation. If the Executive Assistant takes on responsibilities and senior leadership support, the CAO has more hours per week to think broadly and concentrate on the City's vision.
- Managing projects in the CAO's Office or throughout the corporation.
- Acting as a sounding board to assist the CAO in making decisions.
- Acting on behalf of the CAO when absent or in a meeting.
- Having a seat at the senior management table to participate in the leadership strategy sessions or weekly meetings.
- Liaising with internal and external stakeholders.

Being a "strategic" Executive Assistant may give you greater enjoyment in your position and the feeling that you're making a difference and contributing more to the direction of the organization. You may be already serving as a strategic Executive Assistant without even realizing it - it comes naturally to you, or you may be really struggling with confidence which may be holding you back in your career.

By taking on more responsibility and providing this strategic level of support, you will be viewed differently by the corporation, and perhaps in time a title change may be in order such as the Office Administrator, Strategic Advisor to the CAO, Director of Executive Office Operations, etc.

If possible, build a good network of high-performing Executive Assistants and have regular conversations with them to discuss new strategies that they may be working on in their own municipalities.

How to Get your CAO on Board

Most CAOs are delighted to see proactive initiatives and strategic thinking from their Executive Assistants, however, what do you do if your boss is reluctant with your additional enthusiasm? Typically, they may think that you will neglect your regular administrative duties, so maybe a gradual approach is best to make them less apprehensive.

Creating a 90-day plan with gradual opportunities for increased leadership will allow both parties to see how the new dynamic will work. Seek constructive feedback from your CAO on your areas of improvement, putting your ego aside (if you disagree) and step up to the plate. It's always a good time to demonstrate your positive and proactive nature.

If there are potential courses on leadership, strategy, or other skills you'd like to learn, ask your boss for some funds from your Corporate Training Budget.

Proactivity and Anticipating Needs

The ability to predict and plan the needs of the CAO is considered the **number one** determinant of whether an Executive Assistant is good at their job. Exceptional Executive Assistant's anticipate requests, needs, and potential problems often before their boss has even considered them. They are "mind-readers" and can predict the daily flow of work in the office.

We all know that most Executive Assistants are proactive, not reactive - but with so many tasks, e-mails, phone calls and any other obstacles it's hard to get out of the "putting out fires" stage. You are constantly anticipating your CAO's needs and planning ahead, and you can easily apply these skills to stay proactive rather than having to be reactive.

In reality, it is more often than not the chemistry between an Executive Assistant and the CAO that makes the role a success. When an Executive Assistant is in tune with their boss, they can anticipate what they need before they need it, what meetings need to be scheduled, who they want to talk to, and to a certain extent what decisions they are likely to make.

How do you handle the problems and emergencies that pop up in the day-to-day life as an Executive Assistant?

As you become more familiar with your role, your CAO, and the organization, you will be able to predict very quickly what might cause a "fire". There are many things that happen in an average workweek that require your prompt attention, whether it's the CAO needing a whole day of meetings rescheduled, an IT outage, or a state of emergency - it's your responsibility to deal with it at a moment's notice.



Many times, the fires that we are putting out could be prevented if people had planned ahead. It's always advantageous to look ahead and determine where weak points might be so you can plan how to address them ahead of time. It may seem like an extra step in the moment but spending that little extra time on the front end could help prevent chaos in the future. After the fire is put out you can ask yourself the following questions to be prepared for the next time:

- Was something overlooked?
- How did that happen?
- Was someone underprepared?
- Was anyone held accountable?
- How can it be prevented from happening again?
- Was it an oversight on your part?
- Was there enough time?

Preparing for fires is a good precaution but there are some instances, like travel, that can represent a whole category of potential flames for an Executive Assistant. If there are last-minute flight cancellations, you could easily spend hours rebooking everything - which has you pushing everything else that you had planned on achieving that day to the side. This is where the travel itinerary that you made for your CAO comes in handy with all the contact information and details for all the hotels, airlines, rental cars, etc.

Proactivity is a skill, and one that requires preparation and foresight. If you can reduce the number of fires you need to fight and improve how you fight them, you will create the space you need to take proactive action in your workweek.

“One of the most challenging jobs of an Executive Assistant is remaining two steps ahead at all times. Being aware of what is needed prior to being asked. This assists with scheduling and other areas of the position. Ask questions, take notes, be present and focused to support the CAO, Mayor and Council.”

-Executive Assistant

Composure Under Pressure

Staying calm under pressure is an important skill for a high performing Executive Assistant to focus on. Appearing to be calm under a stressful situation requires you to control your knee jerk reactions and be less reactive, have control over your body language, your voice, and your internal responses.

The composure of an Executive Assistant is reflected in their attitude, body language and overall presence. Nobody respects somebody that is always in a panic and creates drama wherever they go. This also makes employees feel uneasy. Many times, crisis results when composure is missing.

Glenn Llopis (Contributor) to Leadership in the Age of Personalization, provides the following seven ways to maintain leadership composure during the most pressure-packed moments:

- 1 **Don't Allow Your Emotions to Get in the Way.** Seasoned leaders know not to wear their emotions on their sleeves. They don't yell or get overly animated when times get tough.
- 2 **Don't Take Things Personally.** Leaders shouldn't take things personally when things don't go their way. Business decisions and circumstances don't always play out logically because office politics and other dynamics factor into the process. As a leader, remain calm and don't get defensive or think that you always must justify your thinking and actions.
- 3 **Keep a Positive Mental Attitude.** Employees are always watching their leader's actions, behavior, relationships, and overall demeanor. Stay strong, smile often and authentically exhibit a sense of compassion.
- 4 **Remain Fearless.** When leaders project confidence, they instill it in others. When you begin to get fearful, ask yourself: What is the worst possible thing that can happen? If you are objective about it, and have the will and confidence to face it, you will eventually realize that the situation is manageable and can be resolved.
- 5 **Respond Decisively.** Leaders who maintain their composure will never show any signs of doubt. They speak with conviction, confidence, and authority - whether they know the answer or not!
- 6 **Take Accountability.** Leaders are most composed during times of crisis and change, when they are fully committed to resolving the issue at hand. When you are accountable, this means that you have made the decision to assume responsibility and take the required steps to problem solve before the situation gets out of hand.
- 7 **Act Like You Have Been There Before.** Great leaders know that one of the most effective ways to maintain composure during difficult times is to act like you have been there before with elegance and grace. It's easy to lose composure during times of crisis and change if you let concern turn into worry and worry turn into fear.

"Don't take office matters personally or to heart – never be too hard on yourself."

-Executive Assistant

Resourcefulness

This is not a job for submissive people who naturally hang back and wait to be told what to do. An effective Executive Assistant is **resourceful, innovative, proactive, thinks independently**, and doesn't need much supervision or direction.

Being resourceful is a quality that your boss will appreciate and helps you to be prepared to problem-solve in the moment and to turn challenges into advantages in the blink of an eye. It's all about optimizing what you have to work with and using every tool in your toolbox until you receive the results you want. Creating your network also helps because you may need to call someone to help you solve the problem.

It's important to never give up when you can't find an immediate solution and to think outside the box. At times you may need to explore options that may not seem logical and ask lots of questions. Remember, the knowledge that you gain from one problem is now a resource you can use in the future.

Thick Skin & Sense of Humour

Have you ever got your feelings hurt by what people say about you? This is all part of life and people often say, "you better grow a thick skin" or as one of the survey respondents said "have strong shoulders". Easier said than done, right - but don't sweat the small stuff in daily life. In the municipal world this could mean that someone disagrees with you or your boss (a colleague, elected official, citizen, etc.), a co-worker says something bad about you, etc....but most of these things are nonsense. We should never have our dreams shattered because someone says we would never achieve X, or you never take the plunge because you are afraid of criticism.

Ernest Hemingway said *"He started talking about my writing and I stopped listening."* If you want to live your life like that, you need a thick skin to tune out the voices outside of you. When you question yourself from somebody's else's words or actions towards you - you stop being yourself.

Darius Fouroux, the author of seven books recommends the following "5 Ways To Build A Thick Skin So You Can Live Happily":

- 1 **Don't Shy Away From Confrontation.** You don't have to be kind 100% of the time. The more you stand up for yourself and others, the better you get at it.
- 2 **It's Never Personal.** If someone stabbed, you in the back at work its usually never personal. They are doing it to get ahead because that's what people do.
- 3 **Express Yourself Online.** Sometimes it's not a bad thing to hide behind your computer if it's easier to be honest with people.
- 4 **Put Things In Perspective.** If someone yelled at you or said something nasty to you, remind yourself how lucky you are - you have a great job, food and roof over your head.
- 5 **You Don't Have To Be Liked By Everyone.** It's impossible for everybody to like you so don't strive for impossible things. Never sweat the small stuff and always smile.

"Learn, launch, and maintain a sense of humour."

-Chief Administrative Officer

"Be committed, work hard, and have fun...with confidentiality and loyalty being important."

-Chief Administrative Officer

Change Management

Post pandemic, it seems that some Executive Assistants are assuming greater responsibility for change management in their organization. As the CAO is making changes to the pre-pandemic processes and procedures, you might assume responsibility for introducing these changes and communicating them to staff and helping them adjust. This is also where your great problem-solving, communication, and decision-making skills come in to help your colleagues navigate through these new ways of working.

Change is inevitable so embrace it - don't fight it. Be flexible and learn to adapt to the new policies and operations as quickly as you can because if you, as the CAO's Executive Assistant, are "walking the talk" then your colleagues and senior managers will do the same.

How to be the "Eyes and Ears"

You work for the boss and sometimes that can be a strike against you, however you need to be the "eyes and ears" of the CAO at all times within the organization so that you can advise your boss of some of the things that he/she would not know. This often means shutting up and listening, and being alert to potential issues, conflicts, and any new bit of information that may be helpful to the CAO.

It is also important to keep the CAO informed of the special achievements and promotions of employees, as well as deaths in employee's families. The CAO may want to reach out to these employees directly.

"This person is my eyes and ears around the office with chatter, comments, or things that may be become a concern – she will often mention to me 'hey, just so you know this is kind of going on...'."

-Chief Administrative Officer

Addressing Staff and CAO Challenges

Addressing challenges employees have with the CAO is never an easy problem to solve and as the Executive Assistant you may find yourself in the middle of it - whether it's listening to the employee, CAO, or setting up meetings. During this situation, it is vital for you to remain professional and neutral.

It is important for senior staff to know they have a place to go to discuss any issues they have with their CAO, especially those issues that they may not feel comfortable talking about directly with the CAO. However, deciding where to direct staff is difficult because of the lack of a direct line between these employees and Council.

As the leader of the municipal organization, it is important for the CAO to provide an environment where staff are comfortable bringing forward issues. In many cases, CAOs have an open-door policy where senior staff are aware that they can come to talk to the CAO about issues, including concerns with them, with no fear of retribution or judgement. Sometimes, this is not possible for various reasons.

If an issue cannot be addressed directly with the CAO and needs to be elevated there are a variety of possible approaches that can be taken. Here are just a few:

- ① Bring in a third-party investigator (e.g., from Occupational Health & Safety, WorkSafe, etc.) to examine and identify a possible resolution to the issue.
- ② The employee can request that a mediator is brought in to resolve the situation.
- ③ If a mediator is refused or is not able to be brought in for other reasons, the employee can request to be placed on Council's agenda at the next meeting to review the concern. This should be treated as an in-camera issue.
- ④ If the employee is uncomfortable approaching the CAO to get on the Council's agenda, they can also go to the Head of Council to request a caucus of Council.

Employees should always speak to Council as a whole and not any individual Council member to minimize the situation becoming a political issue.

The best approach for any situation will vary by location. Part of political acuity is being able to read your local situation to determine the best course of action. In many cases, the process for addressing an issue with the CAO is outlined in the municipality's Code of Conduct policy. The CAO should always review the policy before taking any action. If your municipality does not have a Code of Conduct policy, encourage senior management to draft one according to the requirements of your Province or Territory's legislation.

It is important to note that any of these elevated approaches can create risk for both the staff member and the CAO. For example, this opens a direct line of communication between staff and Council that could lead to termination of one or both individuals involved. For this reason, the best approach is for a CAO to treat their staff fairly and create a positive environment where staff are comfortable coming to talk to the CAO directly.

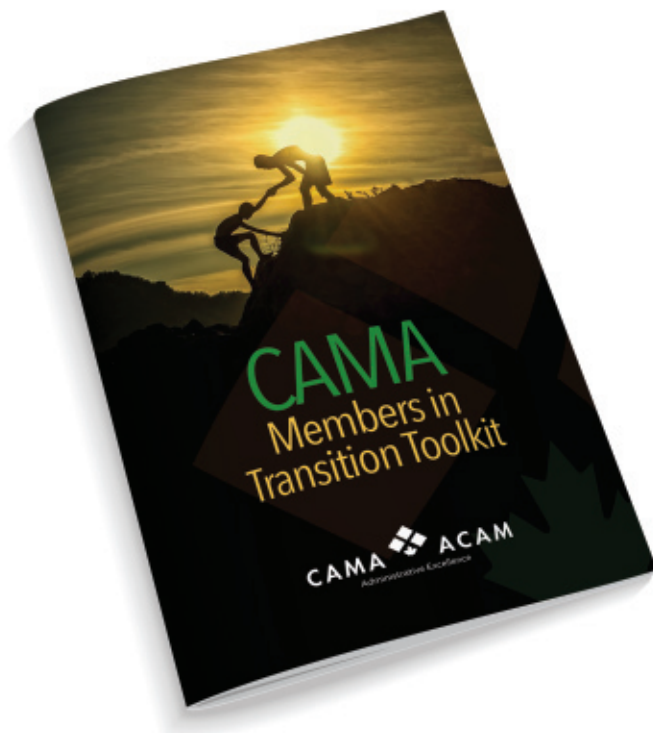
These are situations where the Executive Assistant's professionalism is first and foremost along with being the CAO's "ears and eyes".

How to Prepare for a CAO Becoming a Member in Transition

Your boss may be in the unfortunate position of leaving their employment unexpectedly and this can sometimes be traumatic as well for the Executive Assistant. You are the common denominator in the office and there will be many emotions for you and many tasks to complete following his/her departure.

CAMA's Members in Transition Toolkit is a good resource for the Executive Assistant (and the CAO) to read at any time as it outlines a number of things that the CAO can do to ensure they don't become complacent, that they have a good solid employment contract, and notes things to watch for so they aren't blind-sided by a transition. This Toolkit also outlines the various stages of transition that your boss will go through, and it will help you understand their emotions.

When your boss is terminated unexpectedly this can become very awkward for you as they will be asked to leave their keys, empty their desk, files on their computer may be frozen, etc. This can also feel like a personal loss because your partnership formed the basis of your working day. It's okay to be highly sensitive to your boss' unanticipated departure.



This is a time where you must keep your composure, and more than anything else, remember that your role in the organization is to continue to contribute to the City's success. So, continue to do your job well and try to communicate as normal as possible with colleagues. Try to show confidence in your ability so that other senior managers see you as a safe space. Even if you feel inner turmoil and uncertainty about your future, keep a calm approach and don't be tempted to engage in office gossip about your boss' departure.

It would also be a good idea to set up a meeting with the Mayor/Head of Council to ask if there is anything that you can do to ease the transition, whether they will be recruiting to fill the position and when, and if there will be an Acting or Interim CAO. Show a positive outlook and demonstrate your value to the organization.

Sometimes when there is a change in our boss, it's also a good time to evaluate your position and ask yourself whether you loved the job because of your boss or because of the organization you work in. It's probably a bit of both but if you only stayed with the position because of your boss, maybe it's time to consider a move. You may wish to update your resume in case you decide to move on, and you may end up working for an even better boss whether you stay with the municipality or work for a different company.

The tasks that you may have to complete following the CAO's departure are as follows:

- **Cancellation of Conferences or any other Travel.** If the CAO had already registered for a Conference you will have to contact the organizer to cancel his/her registration, cancel any flights or hotel arrangements, etc.
- **CAMA Membership.** The definition of CAMA's Member in Transition is "A Regular Member who involuntarily ceases to be employed in a management capacity in the administration of a Canadian municipality/or regional municipality, may continue to hold regular membership, at no cost, for one additional year." Contacting the CAMA National Office to advise of your boss' departure and a personal e-mail address would be appreciated so that he/she will still continue to receive our information.
- **Clean Out the Office.** Typically, when immediate departures are undertaken, there is not a lot of time for the individual to clean out their office so this may be a task that you should complete prior to the arrival of the Acting or Interim CAO.

You should also ensure that you get direction from the Mayor (or Head of Council) or the Human Resources Department with respect to any media calls that may be received. Typically, a press release is circulated shortly after the termination.

Looking to the future when a new permanent CAO is hired, the Executive Assistant should ask if they are currently a CAMA member and if not, provide them with the information on the [website](#) to join.

Political Acumen Skills

Political acumen is a skill that is best learned through coaching, observation, and experience. As the Executive Assistant, political acuity is a priority especially when you have the delegated authority to act on behalf of your boss.

The survey respondents rated their political acumen skills at an average of seventy percent (70%) and noted the importance of becoming acclimatized to the political world.

CAMA's Political Acumen Toolkit is a valuable resource to support the CAO in their careers, their direct reports, and the next generation of municipal leaders. All Executive Assistants should also read this document as you too are at the crossroads of politics and municipal management every day. It provides information, downloadable resources, and links to additional materials that will support CAOs and senior managers in building a bridge between the administrative and the political realms. Specifically, the toolkit offers advice that clarifies roles and responsibilities with governance, supports relationship-building at all levels, encourages situational and self-awareness in municipal leaders, helps manage personal risk, and furthers effective communication and stakeholder engagement.

As you are aware, CAOs stand at the crossroads of municipal management and politics. They are the only employee of Council, and therefore, their job is to follow the direction set by the municipality's elected officials. However, the CAO is also a leader. In this role, the CAO is responsible for managing Council relationships outside of the municipality at other levels of government, supporting and negotiating the interactions between other municipal staff and elected officials, administering the municipality's relationship with the public they serve, and providing continuity during Council changes. While it is imperative that senior administrators remain apolitical, being able to understand and maneuver politics plays a crucial part in managing the ambiguities that are inherent to their roles.

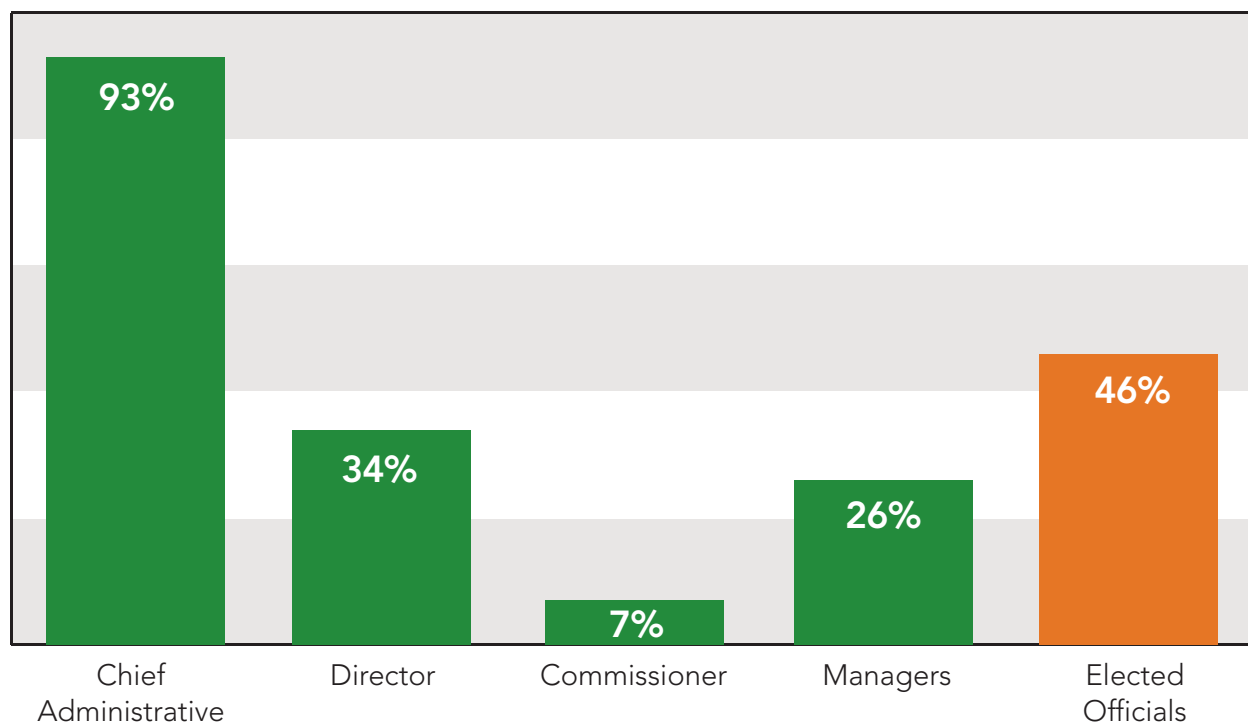


CAOs operate in a unique position, and because of this, they can often feel a lack of support in their roles as they face challenging or even overwhelming situations. **Every municipal leader has been there at some point and you as the Executive Assistant can help steer the ship by being the “ears and eyes” on the political acumen front as well. The topics outlined below from CAMA’s Political Acumen Toolkit are situations that the CAO may/will face along with the Executive Assistant. Over time, experience will provide you with political acuity that will give you the tools to deal with any situation that comes your way as the “gatekeeper”.**

Working for the Mayor, CAO, and Council

Ninety-three percent (93%) of survey respondents provide administrative support to the Chief Administrative Officer, 34% to Directors, 26% to Managers, and 7% to Commissioners. **Of particular note is the fact that 46% of the Executive Assistants look after both the CAO and the elected officials.**

Q9 To whom in your organization do you provide administrative support? (Choose all that apply)



This model is common in the smaller municipalities. It is a juggling act when you work for multiple bosses, especially if you work for the Mayor and Council and your bosses change every three to four years, which may also mean that the entire direction of the organization changes. As previously noted, no boss is the same so it’s important to adapt to their leadership style and having clarity on your role for each position is a very important piece that should be discussed on the first day of your job so there is no confusion.

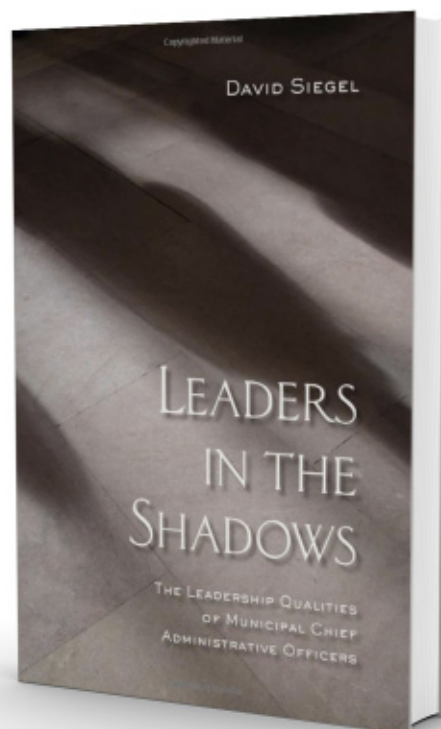
It's important to understand the CAO-Council relationship and know the dynamics of both parties that you report to. This is also where your political acumen skills must be strong, along with your loyalty to each boss - which can be a balancing act when reporting to administration and elected officials. As observed by David Siegel in [Leaders in the Shadows: The leadership qualities of chief administrative officers](#), "The CAO must work for a diverse group of people who sometimes have strong public disagreements with one another. Yet the CAO must take direction from this fractured group and pass that on to municipal staff."

You will also be in the middle of the chaos on some days as you too navigate through the political waters of the behaviours that emerge between the Mayor, Councillors and the CAO. You need to go back to the principles of your job and be professional even when your bosses are not being amicable. One best practice is to always follow the policies and procedures of the organization - these guiding documents will never take you down the wrong road.

Working in the Mayor's Office is a "public-facing" position and brings responsibilities such as proclamations, flag raisings, dignitary visits, public events - just to name a few. More calls from the public are also received. When making decisions on any actions, following are some questions for you to ask yourself:

- How is this going to affect the Mayor or CAO?
- How is this going to affect the municipality?
- Is one simple decision going to turn into a mess?

There is always a grey area that has to be navigated and you should try to ensure that all of these questions are covered before you move forward.



"By having the Executive Assistant support both myself and the Mayor, she is able to advise of matters that may be of common interest and provide us each with updates to ensure there are no surprises."

-Chief Administrative Officer

"It is challenging to stay neutral between the Mayor and CAO when they are not agreeing. You must have the ability to read the political versus corporate pull/differences between the Mayor and Council and the CAO."

-Executive Assistant

Case Study: What if the Mayor Asks You to do One Thing and The CAO Asks You to do the Opposite?

I have learned that the best way to handle this type of situation is simply effective communication. Having a trusting relationship with the CAO/Mayor also comes into play here as does confidence which is ultimately derived from experience.

I have simply just asked the CAO and Mayor for a quick meeting to discuss the conflicting instructions that were given to me to ensure that we are all on the same page. I have also done this in the past when dealing with multiple managers who have assigned simultaneous tasks with conflicting priorities. Nothing like a candid sit down with the managers to determine what takes priority.

Submitted by an Executive Assistant

The Council and CAO Relationship

A positive working relationship between a Council and their CAO is vital for a municipality to achieve their goals. A municipality that loses confidence in its CAO is a municipality that begins travelling down the road to replace that individual. Always remember that a CAO is hired at the pleasure of Council. Strong political acuity by you, the Executive Assistant, and the CAO, can help to identify when Council's direction may be changing, and adjustment is needed. Below is an executive summary of some tips that the CAO and the Executive Assistant should keep in mind when building strong relationships with the Mayor and Council:

- **Respect Elected Officials and Their Office.** Its important to be mindful of the relationship you develop with Council as a whole and with individual Council members. As their one and only employee, the CAO is subject to their whims and wishes. For this reason, the CAO must always put their best effort forward to respect the office they are elected to.

TIP: It is important to always call the elected officials by their professional titles - Councillor, Your Worship/Mayor, unless they tell you otherwise, and even then, in public ALWAYS use their professional title."

- **Always Speak Positively.** Speaking negatively about Council, whether internally or externally, is never a good idea. Even when a request from Council seems out of left field and completely irrelevant, remember that the request was made for a reason. While it is easy to be tempted to roll your eyes or make a joke to another staff member, these interactions are rarely unseen. When you are frustrated with Council or a particular Council member, try to look for the root of the issue and find a way to address it positively.
- **Be Sensitive to the Needs of Council.** In some cases, such as when sensitive issues go sideways, elected officials will try to redirect blame to preserve their reputation and standing in the community. If it's a priority for Council, it should also become a priority for the CAO. Political acuity is being sensitive to the needs of Council and the political environment.

- **Relationships.** You and the CAO are expected to have a solid business relationship, but you should exercise caution on how involved you get personally with the elected officials as it could have repercussions. Each member of Council is different and unique. Some you can joke with; with others you need to be very careful what you say. Either way, it is important to be mindful that they are your boss and you should treat them all equally and fairly. Treating some Councillors one way and others differently can lead to problems that could easily have been avoided. When functioning as a CAO in a smaller community, this can become particularly challenging as everyone knows almost everyone and, in many cases, have pre-existing relationships. There is no specific line in the sand; instead, political acumen is about maintaining the right balance that is appropriate for your particular context.

TIP: Remember - elected officials are employers, not friends. It is important to always maintain a professional relationship, even at social events.

- **Strategic Planning.** Strategic planning is an indispensable municipal process, and the strategic plan can become an effective tool for managing the CAO-Council relationship. For CAOs, the strategic plan becomes a yardstick for municipal accomplishment. It allows the CAO to demonstrate the effectiveness of their Administration to Council and the community. It also helps the CAO manage their own workload, as well as that of their employees, by providing a guideline for establishing priorities. Every effort of a municipality should be connected to a focus area in the plan. Therefore, CAOs can use the strategic plan as a tool for keeping Council attentive to the goals of the municipality and denying Council requests, when needed.
- **Praise & Criticism.** Because we are all human, positive and negative feedback alike can influence how we operate in the workplace. Praise can create a boost of energy and motivation for your work; criticism can be the incentive needed to make necessary changes in the way you approach your job. However, taken too far, both can become a detriment through either overconfidence or inertia. For this reason, it is important not to internalize the highest praise or the harshest criticism. Political winds are continually changing and what is satisfaction today could be total displeasure tomorrow. Even recipients of CAO awards for outstanding achievements have been terminated shortly thereafter.
- **CAO Performance Reviews.** CAOs should look forward to, and, when needed, even demand an annual performance review. In many Provinces and Territories, an annual CAO review is a requirement. However, even when it is not mandatory, it is advisable to request a yearly evaluation. Appraisals are the CAO's opportunity to officially hear from their Council how well they are discharging their duties from Council's perspective. It is the CAO's report card. It is also an excellent opportunity to confirm what their political acuity radar is telling you. It is critical to the CAO to ensure they consider the feedback offered and put in their best efforts going forward. Please see [CAMA's CAO Performance Evaluation Toolkit](#) for additional information and resources relating to this topic. **As the Executive Assistant you should remind your boss that this process needs to happen and help move it along with the Mayor, Council and City Clerk. While every municipality is different, the process typically runs on the calendar year and starts in mid-August and is completed in December.**

Relationship Building at all Levels

The CAO must build relationships at all levels, including those with neighbouring communities as well as at the provincial and federal level. The Executive Assistant is, of course, also along for the ride in nurturing these relationships.

Intermunicipal Relationships

One of the best places to start with intermunicipal cooperation is for the CAO of one municipality to build a relationship with his or her neighbouring CAOs. While this does not mean that you need to be friends with every other CAO, it is important to develop a positive working relationship that understands and respects the role each CAO plays in representing his or her Council.

As the Executive Assistant to the CAO, your role may be to arrange an informal, recurring meeting between the CAOs, such as a monthly breakfast or lunch meeting. Even if there is no agenda, meeting regularly will keep the lines of communication open and help solidify rapport between the CAOs and, in turn, between the municipalities. Ongoing dialogue with your neighbours also helps build political acumen as it keeps the CAO in the know about information that their colleagues have that they may not have access to. What have your colleagues in municipal administration heard about legislative or administrative changes? Have there been rumours regarding your municipality that should be brought to the CAO's attention? Are residents from another municipality complaining about services in your jurisdiction? It is information like this that becomes a natural by-product of ongoing communication between administrations.

As the Executive Assistant to the CAO (and possibly the Mayor), you may also be arranging meetings with your Council and neighbouring Councils. It is also a good idea to have the Councils from each municipality with a co-terminus boundary meet informally once or twice a year, especially if there is a high degree of collaboration between your municipalities. Building relationships between Councils provides a forum for creating understanding between jurisdictions and discussing common issues. Even in situations where elected officials from different communities are on opposing sides or dislike each other, providing opportunities for connection allows respectful discussion to take place so that Councils can jointly advance mutually beneficial initiatives. When municipalities can work together to meet the needs of residents and ratepayers, both Administration and Council are seen in a positive light and providing forums to achieve this outcome demonstrates political acuity on the part of the CAO and Senior Management.

Provincial & Federal Relationships

Best Practice: When working with provincial and federal representatives it should always be elected to elected and administrative to administrative.

As the saying goes, "It's not what you know, it's who you know and who knows you." Developing a working relationship between your Council, Ministers, and your local Member of the Legislative Assembly (MLA) or Member of Provincial Parliament (MPP) is essential to gaining support for municipal initiatives requiring provincial/territorial approval or funding. Federally, it is important for Council to have a connection with your local Member of Parliament (MP) to encourage discussions on municipal matters at the pan-Canadian level. Likewise, CAOs should also build relationships with Deputy and Assistant Deputy Ministers provincially and federally that enhance engagement administratively.

Elected Officials

When working with other levels of government, elected officials should always be meeting with elected officials and administration with administration. That is, your Mayor, Reeve or Warden, and in some cases, other members of Council should be the ones addressing MLAs, MPPs, MPs and Ministers. While administrators will play a role in facilitating the connection between elected officials at various levels and may participate in the meeting, political protocol and best practice favour elected officials taking the lead in this scenario.

Administration

CAOs should also take the time to foster rapport with the Deputy Minister and other administrative staff of the government department that oversees municipalities. Likewise, the CAO should consider if there is value in developing contacts with other departments influencing key municipal services such as transportation, health, etc. Having strong relationships at the administrative level will help ensure the CAO is given the information in a timely manner and will streamline efforts in building connections between elected officials.

Effective Communication Between the CAO and Council

One key to success in building and maintaining a positive relationship between the CAO and Council is to establish a culture of **“no surprises.”** Politicians do not like to be surprised, so it is imperative as a CAO to keep them informed on any anticipated or ongoing issues. As a general rule, you never want your Council to hear about something in the community, or read about something online or in the newspaper, first.

Keeping the lines of communication open and taking a collaborative approach to issues management helps to build trust and a relationship where the Councillors will also keep the CAO informed so they also do not have any surprises. That said, providing regular updates is not without risk. For example, sharing information with Councillors increases the likelihood of sensitive information getting shared publicly. In other cases, it can result in a breach of confidence between the CAO and Council/Staff if Councillors try to get information from other staff members the CAO is legitimately unable to provide (e.g. the names of the employees involved in sensitive issues that should not be released). For this reason, it is always important to be upfront with your elected officials about the information you can and cannot share and the reasons why. All sensitive communications should also be labelled “confidential.”

In some jurisdictions, if one member of Council requests information on the operation and administration of the municipality, the legislation requires that this information be provided not only to the Council member making the request but to all members of Council. No matter where you are, this is a best practice to follow. It can also help to address the issue of all Council members having the same information. However, there will be occasions when a request for information from a member of Council is private and confidential. In these instances, you will need to rely upon the provisions of your Provincial/Territorial legislation that deals with access to information and privacy protection. As the Executive Assistant, make sure you understand what the practice is in your municipality.

TIP: Sending a weekly update e-mail to Council builds trust and keeps them informed on all relevant issues. It also reduces the time and number of messages required to keep Council up to date on each topic individually. As the Executive Assistant, you can help prepare this communication for your CAO.

How to Remain Neutral and Apolitical

Change in Government

We have all seen unexpected changes in our provincial and federal governments at some point, if not more than once. With government turnover comes new MLAs, MPPs and MPs, all with varying levels of experience in the constituency they serve and the portfolios they are assigned to manage. Furthermore, a new government usually also signifies new policymaking endeavours and a departure from the previous administration's priorities.

When change happens at the provincial or federal level, the best strategy is to embrace it. While it can be frustrating and delay municipal initiatives, it is wise to accept it and get to know the new government's priorities. Doing this allows you to establish new strategies for achieving your municipality's objectives. While politicians can wear their platforms on their sleeves, CAOs should remain neutral and demonstrate the ability to work with whoever forms the government, whether this is at the municipal, provincial/territorial or federal level.

Power Dynamics of One Versus the Whole

A CAO needs to be cautious of an elected official who begins to make "unofficial" requests. While in some cases it may be appropriate to work with a Councillor one-on-one, in other cases it may be seen as preference or worse, collusion. As mentioned above, it is often a requirement to provide information requested by any Council member to all. Sometimes it can be beneficial for a CAO to work directly with an individual Councillor. For example, when you have one elected official that disagrees on a particular issue that Council is dealing with, it is appropriate for the CAO to spend time with this Councillor to help them better understand the topic. As with all aspects of the CAO position, it is important to remain neutral while explaining so that you are not viewed as lobbying for any one perspective.

Case Study: What do You do if One Councillor Asks You For Information?

All Council members should be treated equally and be provided with the same information. This is so that all members have the same consistent messaging, and one is not given an unfair advantage over the other members.

Any time I am asked for information from a Councillor, I ensure that I provide the information to all of them. Most times the requests are made via e-mail where a Councillor e-mails me directly. When responding, I always copy the other Councillors, Mayor, and CAO on the e-mail.

If everyone is on the same playing field, there is less chance of conflict and/or mixed messaging that is relayed to residents.

Submitted by an Executive Assistant

Rogue Elected Officials

A Council member who feels disenfranchised by the CAO is often a dangerous one and the Executive Assistant needs to be sensitive to this. They will often go to almost any length to discredit the CAO and to find or create issues. The best way to avoid this is for the CAO to treat all elected officials respectfully and equally, providing all of them with the same information in a transparent way.

Councillor Alliances

Sometimes elected officials will form alliances to achieve political objectives. While it is important to be aware of these alliances, it is equally important not to be seen as being part of or favouring one group over the other. For instance, when Council breaks for dinner and they sit in two different groups (and you as the Executive Assistant are attending the meeting), do not sit with either group; stay neutral.

Media Relations

As noted in CAMA's Political Acumen Toolkit "Politics are performed in the public domain and as a result, are loved by the media." Media, whether it be formal news institutions, online reporters/bloggers, or the commentary of online social networks, act as a check and balance for elected officials by "keeping them honest." This can either be a good or bad thing depending on a CAO's political acumen and ability to work with media representatives.

As the Executive Assistant to the CAO and/or Mayor, you are the first point of contact with the media. You should be aware of your community's communications policy that outlines who is authorized to speak to the media on behalf of the municipality. Most often, this includes Council, the CAO, and in larger municipalities, a Director of Communications. In some communities, Council may prefer the CAO to speak on behalf of the municipality. However, as a general rule, the head of Council should be doing the majority of the talking. As most CAOs will tell you, it is not usually a good thing if the CAO is ending up in the paper more than the Mayor. While CAOs should be familiar with the media, representing the municipality is better left to elected representatives.

Best Practice: The Executive Assistant should be familiar with their community's media protocols and understand what their boundaries are. Always remember that nothing is "off the record". Any information you provide formally or informally to a journalist becomes part of their arsenal of potential editorial content. When acting as the gatekeeper choose your words wisely.

Visit the [Media Chapter in CAMA's Political Acumen Toolkit](#) to learn more about Managing Media Relationships, Talking to the Media, Media Interviews, and Social Media Use.

Relationship Building & Networking

Relationship building and networking within the administrative professional field is an important part of professional development. We all need to connect with like-minded professionals to share ideas, experiences, and collaborate on issues not only within the organization but externally.

Creating a Network Within Your Organization With Other Executive Assistants

"The Executive Assistant should be a highly trustworthy, thoughtful champion of the corporation and key staff person that the CAO can work collaboratively with and that also leads, supports and mentors the Administrative Assistants in the corporation."

-Chief Administrative Officer

The Executive Assistant to the CAO will inevitably experience a certain amount of distance from their colleagues as you are often viewed as a member of the executive team and the boss' secret agent. It's not personal - it's just part of your position. Remember anything you do or say will be considered a reflection of the CAO; therefore it is important that you do not participate in gossip as your words will carry a heavier weight than others.

Having said that, sometimes we isolate ourselves from the opportunity of networking because we work in the "top office" or we are "just too busy", etc. At the same time, this negative behaviour deprives us from learning and growing and, in turn, providing better support to our managers.

Creating an internal network can be the most powerful resource for the Executive Assistant and the CAO. Some Executive Assistants to the CAO have already created an internal network within their organization to connect with their colleagues that work for the other Directors. But why not include all Executive Assistants to any senior manager in this group to add value and create a peer network for junior and senior employees? The Chair of this group does not always have to be the Executive Assistant to the CAO. Maybe you should start the group but have a Terms of Reference that states that the term of the Chair will be one year. This will provide an opportunity for others to grow and develop and bring new ideas to the table.

The advantages to having an internal network are as follows:

- to improve the culture of the organization;
- to build strong leadership skills;
- to provide opportunities for mentorship through mentee and mentors;
- to potentially host corporate professional development opportunities together;
- to share operational procedures within the organization;
- to build personal relationships;
- to build an administrative pool of resources for possible cross-training and streamlining of workloads throughout the organization;
- to discuss ways the organization can improve processes creating efficiencies corporately; and
- to break down silos between Departments.

While it's important to have this internal network, it's just as important to make sure that this forum is not a place for negativity and complaining about managers or colleagues, and it should also not be a sorority club where only certain people are allowed to participate.

Building Your External Administrative Networks

To continue to grow, it's important to also expand our external networks. Going outside of your organization for professional development is also very valuable and an opportunity to learn best practices from other Executive Assistants that work in local government across the country or the private industry.

Just like your boss is a member of CAMA and any other professional associations, you should also become a member of networking and associations specific to the administrative profession. These associations also should not be limited locally. There is a huge value to be gained by becoming members of global networks and the more involved you are the more extraordinary you will be personally and professionally.



Following are some Associations for Administrative Professionals:

- **Association of Administrative Professionals**, a Canadian Association that provides opportunities for growth through education and community building, ensuring their members have a better understanding of how important their role is to any business.
- **American Society of Administrative Professionals (ASAP)** provides professional development, training, and resources for administrative professionals and executive assistants.
- **Association of Executive and Administrative Professionals (AEAP)** helps members stay informed of advances and changes in professional practice and technology.
- **Executive Assistants Organization (EAO)** is a globally recognized association for assistants with a desire to achieve EA stardom.
- **International Association of Administrative Professionals (IAAP)** is an association for office professionals with approximately 20,000 members and affiliates.
- **National Association of Presidential Assistants in Higher Education (NAPAHE)** serves presidential assistants (PAs) and other professionals supporting higher education leaders.
- **National Association of Professional Receptionists (NAPR)** is a professional association for receptionists, switchboard operators, information clerks, greeters, and administrative professionals nationwide.

“Establish relationships with other Executive Assistants in similar positions to share experiences and strategies. This is invaluable.”

-Executive Assistant

Establishing a Working Relationship With Your Boss (Knowing Your Authority)

The boss and employee relationship is an important one that is built on mutual trust, respect, and understanding. It's important that you build a relationship early on with your boss as he/she will play the most influential role in your success or failure.

If you are just starting out in your career, you may be intimidated and don't feel like you have the authority or confidence to chart the course or say exactly how you feel. If you don't design the type of relationship you want with your boss, your boss will do it for you - and you may not be happy with the results. It's your responsibility, and in your hands, to chart your destiny professionally. You are the person that works the closest with the CAO and sometimes you may have a better understanding than they do of what needs to be done, so your perspective is valuable and should always be stated - don't be afraid to use your voice as it is an important part of the CAO's decision making.

It's important to have regular check ins with your boss to discuss what is working and what is not working and how to find a way to make your relationship a win-win. Ask your boss early on if they are okay with you challenging them and providing feedback on their ideas.

Your boss, the CAO, is also a very busy individual so it's important that the relationship-building starts with you. CAMA's Toolkit on "[How to be An Effective CAO: Asking the Right Questions](#)" has a section about adapting to new leadership which outlines some tips on how to adapt to a new leadership style.

How well do you partner with your boss? To see where you currently stand, take a moment to answer the questions included in a survey from the American Management Association: [How Effectively Do You Partner with Your Boss? | AMA \(amanet.org\)](#)

The result of establishing a relationship from the beginning will be a well-informed CAO (or senior executive) and Executive Assistant working seamlessly; after a few months of regular check-ins (not to mention a few years), the partnership becomes stronger. They will feel less overwhelmed when attending Council meetings as they are up to date, and you feel like you have helped them be successful while sometimes "making the impossible, possible."



"It's important to assert yourself as an extension of the CAO and Council, and do what you can to develop relationships with them and understand what makes them tick."

-Chief Administrative Officer

"Get to know the CAO; by doing that you can understand how they think and then will be able to be their right-hand person."

-Chief Administrative Officer

"If things ever get too much to handle, don't let yourself get buried. Be brave enough to let me know so that we can work on a solution together. This is a tough role – support needs to go both ways."

-Chief Administrative Officer

Setting Healthy Boundaries

Setting boundaries with your boss, senior management team, and colleagues is the first step toward creating a healthy work-life balance.

We have all felt overworked and underappreciated at some point in our career, however, the more we take on, the more difficult it is to create boundaries. Inevitably there will come a time when someone will violate your boundaries, so you need to decide in advance how you will handle the situation.

Following are some tips for setting boundaries at work:

- **Learn How to Say No.** There's nothing wrong with going above and beyond your job duties, but there's nothing wrong with saying "NO" diplomatically. If your boss asks you to do another project and you are already overwhelmed, don't use phrases like "I have too much on my plate right now" or "I'm already stressed out". Set up a meeting to discuss your overall workload and present some solutions and focus on finding that win-win solution.
- **Setting Ground Rules and Communicate them Clearly.** With today's technology, it has become almost impossible to relax after hours when people are sending you texts and e-mails. You need to pick an official time to end your workday and stop checking your devices. If you always reply within minutes, it sets the expectations. Your boss needs to know the time your workday ends.
- **Block Off Your Calendar.** As previously noted, block off time slots in your calendar if you are working on a project and need some time without interruptions. Another option is to dig out those earbuds!

The Executive Assistants also provided the following advice and recommendations on how they set healthy boundaries:

- I set boundaries with my boss so that I am not connected 24/7.
- I leave work at work, especially over the weekend or when taking time off.
- I take one to two hours off right after work where I do not check e-mails or my phone to have time for a workout. After that, I monitor e-mails and messages again, only replying to those that cannot wait until morning.
- I try not to let work spill over into my personal life (and vice versa), however, there are times when that naturally happens.
- I am fortunate to have an employer who also values work-life balance and so taking time off is never a struggle, regardless of whether it is planned or unplanned time off. I also know my limits and plan my tasks in a timely manner to keep from being overwhelmed at work which would leave me burnt out at home.
- I block time for lunch to get out of the office and disconnect.
- Complete work tasks at work and only take things home to work on if critical.
- Be steadfast in your pursuit of doing the right thing the right way, be ready to take on more than you thought you could - and to say no when others can assume the work instead of you.
- There is nothing that can't wait until tomorrow. We are pretty good at what we do - but we are human. Try not to get wrapped up in other people's urgency.

Networking With the Senior Management Team

You work for the top executive in the municipality which can sometimes be intimidating to some, along with the senior management team. But how do you network with them and try to forge relationships with them?

Eggcellent Work notes the following tips on how to network with senior executives that will help you overcome any anxiety and develop good relationships with them.

- **Start a Conversation About Their Interests.** You need to remember that they are people just like you. They have families, interests, emotions, and problems just like any other person.
- **Be Respectful.** Always have a balanced approach and act in a respectful way. Be mindful of their busy schedules, for instance.
- **Ask for Advice or Mentoring.** Ask them for their mentorship. You will be surprised at how often successful people are willing to help those who reach out to them for advice and guidance. Ask them for advice on your career.
- **Don't Try to Sell Yourself.** Don't try to sell yourself to them as this provides no value. Instead, focus on introducing yourself and building a relationship with them first. Also, make the conversation about them.
- **Be Yourself.** Always be genuine and be yourself. If you're feeling very nervous, the best way to deflect attention from your anxiety is to ask thoughtful questions and to listen attentively to what they have to say.
- **Listen, Don't Talk.** An important rule is to talk less and listen more.
- **Be Confident.** Show confidence, but not too much.
- **Offer Your Services.** Even though you don't work directly for them, always offer to help.

"Get to know the full executive/senior leadership team – relationships are paramount in Executive Assistant roles."

-Chief Administrative Officer

"Because I am new to the role, I am working on building relationships with not only the CAO but the senior leaders in the organization. Trying to identify the areas where they all would best be supported by me and how I can make the greatest impact."

-Executive Assistant

Networking With Your Colleagues

How many of us just want to show up every morning and put our heads down and get our work done? Like it or not, building networks with your colleagues is important in the workplace, especially if you work in a larger municipality. Some people truly enjoy it, while others dread the thought of talking to anybody especially since you do it all day with the public.

It is very easy to get caught up in your work and walk around City Hall on your daily missions without paying much attention to other people. How many times have you decided to do all your deliveries at once at the same time you go to the washroom? You should also make sure you smile when you're on a mission and take a moment to say "hi" to someone and introduce yourself if it is a new employee. Working in the CAO's Office comes with being welcoming to everyone and helping employees feel more at ease and less intimidated when they come to visit.

What do you do for lunch, or do you even take lunch? Below we will talk more about work-life balance, however, let's focus on the importance of taking lunch first. It can be too easy to get in a habit of eating your lunch at your desk, however if you'd like to build your network, it may be a good idea to go to the lunchroom. It's good to talk to your colleagues in a more informal capacity and, in turn, they will be less intimidated when dealing with the CAO's Office.

Does your CAO make an effort to meet with every new employee? If they don't it may be a best practice to consider. Meeting the boss during their first few days with the municipality, can be reassuring to the new employee and can create a good rapport from day one. New employees are typically excited to meet others and learning some special tips from the Executive Assistant to the CAO can also be welcoming. Remember to also ask them about their background as they have some expertise that you can also learn from.

Best Practice: Don't speak negatively about any other colleagues. Let the new person draw their own conclusions.

The other critical piece of networking with your colleagues when working for the CAO, is to ensure that you participate in corporate initiatives - whether it is on volunteer committees or planning such events as retirement parties. It may be an opportunity to attend something in a department where you don't know a lot of people. Look at these invitations as opportunities and not obligations.

You may also take advantage of LinkedIn to learn more about your colleagues without crossing that line into their personal life. Connect with them and start building your network!

Your colleagues are truly your most valuable resources and it's important to stop and take a few moments to connect with them.

"The position unfortunately requires some social separation from other staff given you will know things others will not. It is good to be able to anticipate office needs and to have the confidence to provide perspective to the CAO from another angle in the organization, other than input from the senior management team."

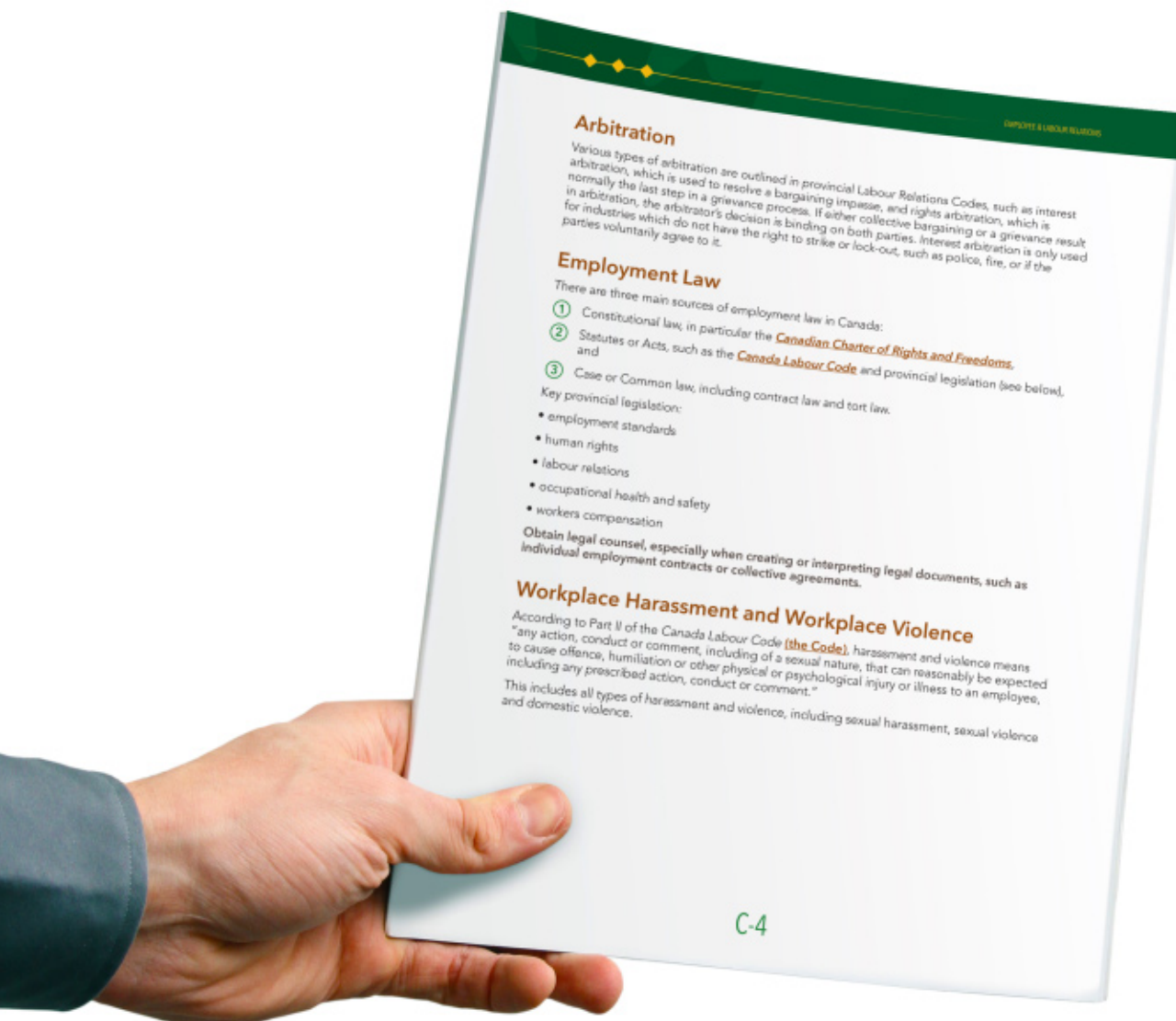
-Chief Administrative Officer

How to Deal With a Difficult Boss

In a perfect world, we would all have fantastic bosses who helped us succeed, appreciate our work and are just wonderful people. Unfortunately, that's not always the case.

Things get hectic in the CAO's Office, and every day is different but sometimes stress takes over and tempers flare. The Executive Assistant is the closest to the action and may occasionally take the brunt of this. An Executive Assistant should never accept abuse - and should know when and how to protect themselves. If you feel that you are in a situation where you are being taken advantage of or disrespected, you should quickly address the issue. Unfortunately, abusive relationships happen in all kinds of dynamics - not just parent-child or domestic relationships. In the workplace, such abuse takes many forms (mental, physical, sexual) and should not be ignored just because the CAO has authority over you.

A good resource is [CAMA's Human Resources Toolkit](#) - the Employee & Labour Relations Chapter has information on Workplace Harassment and Workplace Violence.



This could be an awkward situation with the CAO's boss being the Mayor and Council. If you don't feel that you can address the issue one-on-one with the CAO and are not part of a Union, then it is recommended that you contact your Human Resources Department first. In smaller municipalities, if the CAO is also the Human Resources Manager, then the only other option is to speak in confidence to the Mayor or Head of Council. If you are part of a Union, you should speak to a member of the Union Executive.

As noted in an article by themuse.com "you still have to make the best of the situation and get the job done." Below is a summary of "10 Brilliant Tips for Dealing with a Difficult Boss":

- 1 **Make Sure You're Dealing with a "Bad Boss".** Before trying to fix your bad boss, make sure you really are dealing with one. Is there a reason for their behaviour, or are you being too hard on them? Observe your boss for a few days and try to notice how many things they do well versus poorly.
- 2 **Identify Your Boss' Motivation.** Understanding why your boss does or cares about certain things can give you insight into their management style.
- 3 **Don't Let it Affect Your Work.** No matter how bad your boss' behaviour, avoid letting it affect your work. You want to stay on good terms with other managers in the organization.
- 4 **Stay One Step Ahead.** Especially when you're dealing with a micromanager, head off your boss' requests by anticipating them and getting things done before they come to you.
- 5 **Set Boundaries.** Working with someone who seems to have no boundaries means that you must go ahead and set them. Learn to distance yourself from that behaviour.
- 6 **Stop Assuming They Know Everything.** Just because someone has a managerial title doesn't mean that they have all the right answers, all the time.
- 7 **Act as the Leader.** If you know your area well enough, there is no reason to not go ahead creating and pursuing a direction you know will achieve good results for your organization. Of course, you don't want to do something that undermines the boss, so keep him or her in the loop.
- 8 **Identify Triggers.** If your boss has anger management problems, identify what triggers their meltdowns and be extra militant about avoiding those. For example, if your boss starts foaming at the mouth if you arrive a moment after 8:00 a.m., plan to get there at 7:45 a.m. - Every. Single. Day.
- 9 **Use Tips from Couples' Therapy.** When dealing with a disagreement with your boss, pull some mediation recommendations from couple's therapy to work through the issue. Simply repeat back to him/her what he/she said and ask, "Is that what you meant?" If he/she agrees to your recap, ask him/her to tell you more about it. When you repeat someone's perspective back to him/her, you give him/her a chance to expand and, to feel heard.
- 10 **Avoid Future Bad Bosses.** When interviewing with a new organization, do your research ahead of time to make sure you're not getting into another situation with a less-than-ideal boss. Have coffee or lunch with one or more staff at the new organization to learn more about the culture, without appearing creepy, of course.

Best Practice: "I realized then that, just because someone is in a position of authority, doesn't mean he or she knows everything. From that point forward, I stopped assuming the title 'manager was equivalent to 'all knowing'. - [themuse.com](https://www.themuse.com)

How to Deal With Difficult People

Difficult people are all around us. I'm sure you have had to deal with difficult people throughout your career and personal life whether it is your boss, a colleague, the public, friends, or family.

We never know why some people are difficult to deal with and the reasons are as varied as the people are as everyone has a story that we know nothing about.

The best way to deal with a difficult situation is to focus on our own reactions especially when it feels like someone is attacking you - they are upset that the snowplow hasn't been on their street yet, their sewer is backed up, the traffic lights aren't in sequence and they were late for their appointment, the garbage truck is an hour late, the lawn is an inch higher than usual, there aren't enough garbage cans on the trails, there is a dog off its leash, there are scheduling problems at the rinks, the webcam has cobwebs on it and they can't see what's going on at City Hall, the development process takes too long for a building permit, how long will there be a detour because the City is improving the street, why were the trees cut down in the park, the bus wasn't on schedule, why did I get a parking ticket, why is the splashpad closed - just to name a few.

It's always best to listen to the complainant's problem first and reflect. Every ounce of kindness and respect that is given goes a lot further than being difficult. Kindness and compassion diffuse the situation especially when you don't know what the other person is going through, which may be the cause of them being difficult. Usually, they will respond in a positive manner.

Often individuals will express themselves in an e-mail and hide behind their words. The best advice would be to pause before you respond and maybe even wait 24 hours to think about what your response will be. Stay calm when dealing with a difficult person and relate specifically to their problem as there is no standard script - your results will be much better.

We also have a lot on our minds and in our personal lives, however as previously noted, we represent our municipality and the taxpayers, and they deserve to be treated with fairness and respect. It would be inappropriate at any time to come across short, abrupt or condescending as this could add fuel to the fire. Put yourself in that person's shoes and treat them like you would like to be treated.

No one enjoys conflict and sometimes this can lead to having difficult people walk all over you. Dealing with a difficult person is challenging but if you don't stand up for yourself and establish boundaries, it's even worse. You also deserve to be treated with respect so don't allow yourself to be treated poorly by the difficult person. Stand up for yourself when it is necessary.

"It is always my pleasure to be the first person to greet everyone and try to make a difference in their lives by just simply being kind. It truly is one of the most rewarding parts of my job – to make sure they leave the office or hang up the phone as a happy customer. Sometimes taking that 20 minutes out of your day to listen makes a big difference in somebody's life."

-Executive Assistant

Exercising Self-Care

How to Support Others Without Sacrificing Yourself

Being an Executive Assistant to the CAO is a demanding job with a lot of balls in the air, a heavy workload and sometimes many hours. Sometimes it's easy to look after everyone else and unfortunately let your own needs fall by the wayside. It's a balancing act to not let this happen as it can become a slippery slope. We are supportive and empathetic people that tend to hold others up more than ourselves. When this happens, your energy gets depleted quicker, and your mental health may be impacted.

It's easy for somebody to tell you that you need to prioritize yourself and your self-care, but we all know that's easier said than done, especially when you have so many people at work and at home relying on you. Your job must be sustainable for your mental health.

Remember the setting of boundaries referred to in an earlier chapter? Healthy boundaries need to be set even when it comes to returning messages, working after hours, working through lunch, etc. Keep one day a week at the office where you (and perhaps your boss) have no meetings. This will give you both time to reflect on the week and prepare for the next.

If you have had to have a tough conversation at work or in your relationships at home, you need to find a way to let go after that conversation is over. Listening and supporting a person in that moment has helped them, but letting go after and honouring your own boundaries can help you with this. Everyone has different ways to lighten their load which may include meditation, yoga, journaling, or something specific that helps you relax. It's you versus you – do what works for you.

It's also important to have your own support system whether it's a friend, family member, partner, or perhaps a counsellor. Most municipalities provide an Employee Assistance Program (See [CAMA's Human Resources Toolkit](#)) that can support you and your needs.

One of the most important things to do to not sacrifice yourself and to put your own mental health first is to be self-aware and recognize when it's time to step back before you are overwhelmed. Having that one person that is your "go to person" when you see yourself struggling is so important.

"It can be challenging at times, as Executive Assistants are often not necessarily nine to fivers, so there are often times where you go beyond the call of duty. To manage this, I exercise regularly and take the time I need for myself when it is desperately needed. I also have a wonderful family that supports me and spending time with them is of the utmost importance as they help me balance work-life. I also have some very close colleagues, that have now become my friends, that I can call on for support and I reciprocate the same to them when I can see they are struggling. Having a good support system in place is vital."

-Executive Assistant

Burnout Stressors and Signs

At some point in your career, you may have experienced burnout. Executive Assistants can be very susceptible to burnout due to some unmanageable workloads, confusing work responsibilities, deadline pressures and, perhaps at times, a lack of support from your boss. What can you do when your job affects your health?

Here are some tips to avoid burnout:

- **Talk with your boss** and explain how you're feeling and discuss a more manageable workload. Communication is important to creating a healthy work environment.
- **Get Enough Sleep.** You need to prioritize sleep for your physical and mental health.
- **Try a Relaxing Activity.** Yoga, meditation, or tai chi can be great ways to release stress.
- **Exercise Mindfulness.** This gets you to focus on yourself internally and know how you're feeling in the moment. It can help you cope with the challenges of life and work.
- **Find Support.** Talking with trusted colleagues, friends and family is an important way to share how you're feeling and seek help. Also, finding a counsellor is a great way to discuss your feelings and get support.
- **Get Moving.** Taking at least 30 minutes of exercise is proven to have a multitude of health benefits. Not only is it good for you physically, but it can improve your sleep quality and mental health as well.

You need to look after you to help you look after everyone else.

Work-Life Balance

The Executive Assistant to the CAO's job is stressful and intense and working with powerful people can be intimidating. It's also difficult to maintain a work-life balance because you may feel the need to work the same hours as your boss, and believe it's the only way to prove yourself. You should never let the desire to succeed professionally negatively impact your personal life and your health. Sometimes you have to make exceptions but don't make a habit of it and set the boundaries early on – just because they may lose sight of work-life balance doesn't mean that you have to.

Most high-energy bosses are also type A personalities and assisting these types of people can be frustrating as they are workaholics.

Marisa Sanfilippo, a contributing writer for Business News Daily, defines work-life balance as "the state of equilibrium where a person equally prioritizes the demands of one's career and the demands of one's personal life. Some of the common reasons that lead to poor work-life balance include:

- Increased responsibilities at work,
- Working longer hours,
- Increased responsibilities at home,
- Having children.

She also outlines the following eight ways to create a work-life balance in her [article](#):

- ① Accept that there is no perfect work-life balance.
- ② Find a job that you love.
- ③ Prioritize your health.
- ④ Don't be afraid to unplug.
- ⑤ Take a vacation.
- ⑥ Make time for yourself and your loved ones.
- ⑦ Set boundaries and work hours.
- ⑧ Set goals and priorities and stick to them.

Of note is the recent more hybrid and flexible work schedules that many employers are implementing which benefit both parties and improve their health and well-being. While it's important to be available to your boss when he/she needs you, especially when Executive Assistants are on the front-line, you may be able to negotiate a more flexible schedule that creates a better lifestyle for you.

Part of work-life balance is also to reward yourself for doing a great job – even if nobody tells you. Take yourself out for a nice dinner, buy a new outfit, or get a massage, because you deserve it. You need to be your biggest cheerleader as you are totally worth it.

We asked the Executive Assistants what they do for work-life balance, and it was apparent that they do a great job at setting boundaries between their personal and professional lives. They take their vacation, practice relaxation and self-care, exercise, enjoy nature, travel, spend time with their families, and enjoy a flexible work schedule.



Many survey respondents attributed their work-life balance to the newly introduced hybrid work schedules including a compressed work week, working from home one to two days per week, and a flexible work schedule. Support from the CAOs was also appreciated to ensure Executive Assistants achieved a healthier work-life balance.

"I leave my laptop at work and only check my work e-mail briefly on Sunday evenings to take note of any urgent items that have arisen over the weekend and require follow-up first thing on Monday mornings (our Council meeting day). I use my time efficiently at work to limit the amount of overtime required. I am also able to 'leave work at work' – once I'm home for the evening, I don't think about work."

-Executive Assistant

"My work is very good about making sure employees get out when their day is complete unless something is urgent. They do not want you staying or coming in after hours."

-Executive Assistant

"It is challenging to ensure that there is some 'me' time in the CAO's schedule to help promote work-life balance for them as well. People are very demanding of the CAO's time without respecting their scheduling needs."

-Executive Assistant

Case Study: A Story About How an Executive Assistant Worked Too Many Hours Even When The Boss Didn't Expect it

Well, that's me and my definition. What factors led to this situation you ask? Me, myself, and I. I was never asked to respond after hours, or on weekends. It started at the beginning and probably a bit of insecurity to ensure all the T's & I's were crossed or dotted. I'd drive home and log in immediately to my Webmail and re-read the e-mails sent during that day. There would be new asks that popped into my inbox, and I revisited my boss' calendar to ensure I looked at the best scheduling scenario for both his next business day and/or week. Who are we kidding? I was looking one month ahead.

Shortly after being hired, we ordered the appropriate equipment to ensure I was successful in my role - an iPad/iPhone and a functioning laptop (that was light to carry back and forth from home to work). My iPad/iPhone became my new buddies while watching TV. I kept saying to myself that it will make my next morning less stressful, and I'll be ready for what the day brings ahead. Like an addiction, I found myself not being able to let go. For example, I would jump onto an e-mail thread during my day off which was not always productive, and was confusing for both my boss and the person requesting information. In addition, *what message was I giving the Acting Executive Assistant?* That she could not handle it?

How did I start addressing the situation I was in? Talking to my Acting and providing my personal cell, so if the 'sky was falling' she could reach out and get direction, **only if required**. I also had a frank discussion with my boss that we needed to practice healthy options outside of work (like not taking my work phone when going for a walk or to my yoga class, and leaving the iPad/iPhone in my work bag after 5:30 p.m.). This spilled into a healthier option for my boss as well, **time off for us both not being connected to our devices**. He too needed to stop and take a well-deserved break. The new routine was that e-mails 'written' would go into draft (if we really wanted to write down our thoughts), we didn't copy each other when on vacation, and of course clear communications like a simple text saying "I'm going off the grid now".

What lessons did you learn from this scenario? It's okay to give myself permission to stop. As I mentioned earlier, I felt if I didn't jump on or respond **immediately** that I was somehow a less productive Executive Assistant. I also burnt out, which made me a less productive employee, wife, mother, and daughter. The partnership that you develop with your boss needs to be honest about what you both need and providing some new options to make it easier.

What advice would you give someone going through a similar situation? It's okay to give yourself permission to both do it and not do it. You need to find your **balance** that works best for you. I found re-reading the e-mails, and re-checking a document and calendar appointments, gave me peace of mind. And working 24/7 was best for me, especially in some scenarios that I knew were required (such as during an election and COVID). However, the eye opener for me was when I recognized signs that my concentration was off because I was exhausted - that's when I needed time to be "off".

Submitted by an Executive Assistant

How to Adapt to New Leadership

Change is also difficult for you and the senior management team and it too creates a lot of anxiety. How do you deal with a change in leadership and the direction of an organization?

Be prepared that your role may change with new leadership so you must be able to pivot and adapt even though it may not be your style. It's how you react to change that is important.

There are many styles of leadership that exist and, in the end, none of them are right and none of them are wrong. Communication is the key. Meet with your boss to determine the expectations, and things that you can do to be helpful to them and be honest and up front from the beginning. As outlined in CAMA's "[How to Be An Effective CAO: Asking the Right Questions](#)" Toolkit, following are some tips on how to adapt to a new leadership style:

- **Remember Your Boss is Human Too.** Make them feel welcome, valued and valuable. Don't try to be the boss while they are learning - just do your job well.
- **Approach.** Get off to a good start and strive for open communication. Proactively tell your new boss that you want to be part of the new team and follow up with actions to reinforce this.
- **Attitude.** Choose to be optimistic. Always believe the best about your new boss and focus on these positives with all people. Don't compare them to a previous boss.
- **Learning.** Get to know them and their style and help the boss learn. Seek out their perspective early and often and be open to new direction.
- **Know Their Expectations.** Ask how you can help and move on your new boss' agenda immediately and know their priorities.
- **Implementation.** Adjust to your new boss' working style immediately.
- **Delivery.** Be on your "A" game. Be present and "on" - Your old wins with the old boss are history. You're starting all over again.
- **100 Days.** The first 100 Days of Learning. You need to allow some time to get to know each other and your personalities which could take some time.
- **Just Be Yourself.** No explanation required.

Also, as previously noted, ask your new boss if they have a membership in CAMA. If they do have a membership, contact the CAMA National Office to provide their new contact information and if they don't - ask them why not? CAMA sees the Executive Assistants as an amazing connection in the continuity of our membership for each municipality as you are the constant.

Words of Wisdom From Executive Assistants Across Canada

The survey respondents provided some great advice to a new Executive Assistant including building relationships and being prepared for a fast-paced ever-changing work environment that is both challenging and rewarding.

Being extremely organized and paying attention to details will also make you successful, along with being professional, a good listener, and always keeping confidentiality in mind. Creating a positive relationship, communicating with your boss, and asking questions was also a key piece of advice. A few comments received also referenced not taking things personally - very good advice!

At eighteen years old I was thrown into a Council meeting. I was nervous about a lot of things: not getting all of the motions, not being able to repeat them back when asked by the Mayor, not ordering the right food for the meeting, and the list goes on. There were many days that I thought I wasn't doing a very good job, but over the years my confidence grew, especially when I surrounded myself with great mentors. I had this quote by Vishen Lakhiani on my desk: **"Epic things start with small humble steps. Pay respect to your beginnings. And if you're just starting out, know that it's OK to be sucky. To be small. To be messy and chaotic. Just make sure to never stop dreaming."**

Deciding to take a leap of faith and after eighteen years of employment in 2001, I moved from the City of Toronto to the City of Mississauga. I quickly found myself in a dilemma. Leaving a supervisory position to join the Customer Service Team resulted in both a decrease in pay and status, however I have no regrets and was making this change for my family.

A short three months in, an opportunity presented itself; a Junior **Administrative Assistant** to a Senior Manager. My immediate reaction was "I don't want to be someone's secretary".

Well, that was 2001 and the rest is history! I **owned** that position; I grew as a city employee and found my calling. After thirteen years, I then found myself in one of the four Executive Assistant positions at the City of Mississauga. Embracing my role, my team, and fellow departmental admins, I quickly realized that it was not just a secretarial position, it was **not** just an admin/support person. This position is one of importance. A position that was respected by both internal/external customers, the front facing person and first person that an elected politician or leader will encounter. We can make or break that relationship, and the power we hold should not be treated lightly.

"To be respected, you must respect those that cross your path" and most important, be KIND to yourself, we are our worst critics".

Interesting Facts: Challenges of Being an Executive Assistant

When asked what the most challenging aspect of being an Executive Assistant to the CAO (or other senior executive) is, both sides agreed that the job can be a very demanding and stressful work environment, and at times, managing and balancing multiple priorities and tasks simultaneously can become overwhelming. Dealing with the public and elected officials can also be difficult. The Executive Assistants also highlighted the importance of developing a good relationship with their boss, with communicating regularly being the key to a successful partnership.

Interesting Facts: Most Rewarding Aspect of Being the Executive Assistant to the CAO (Or Senior Executive)

Executive Assistants find their profession to be extremely rewarding as they get to perform a variety of tasks, while supporting the CAO in implementing the vision for the municipality and helping others solve their problems. There is a strong sense of accomplishment in seeing the many projects come to fruition through teamwork which is most often very appreciated. This in turn, makes the organization successful and you know, as the Executive Assistant, you played a huge part in it behind the scenes.

"I have mentored some of our new Administrative Assistants in our organization, and the best piece of advice I offer to them is to have an honest conversation with their Boss (and/or those that they support) to get an idea of how best to support them and what their expectations are. They know what they want (for the most part) and individual needs can be different and unique. Once you know the expectations, that will assist a new EA in developing and finessing their role and processes, and over time, the anticipatory factor will come into play. Also, having access to their schedule(s) and e-mail is beyond beneficial as there will be times that you can alleviate their workload by addressing inquiries that you could simply answer on their behalf. You are their right-hand person, and often are privy to more information than most. Always have their back! Also get to know your leadership team and their assistants, you are a team and are all there for the greater good of the whole organization."

"Being an employee in the public service is an exciting and amazing adventure. When I drive around the community I see the many projects, parks, patched potholes, etc. that I had a part in, because I helped with such things as the budget, took the call from the citizen who complained, helped plan the grand opening to the Convention Centre or new arena, set up that meeting for the Mayor to get the grant funding, etc. Because of these 'little' things that Executive Assistants do in their jobs daily, you are an important part of the growth and prosperity of your community. We all have stuff going on behind the smiles and we do the best that we can even when things aren't perfect."

Knowledge is Power: Advice From Across Canada From Executive Assistants and Chief Administrative Officers

Build relationships – they are worth their weight in gold.

Create a welcoming environment in the CAO's Office so it's less intimidating.

Don't just punch in and punch out ...get to know your colleagues.

Active listening is a crucial component to the role.

Be mindful of everything going on around you.

Be alert to trends, alarms, and changes in the industry.

Keep your ears open and an open door for communication.

Remember you won't be the most popular person in the office, and that's okay.

This is a key liaison position that needs someone who takes pride in their work.

It can be demanding and challenging, and that is what makes it so rewarding.

Always listen closely and have a notebook handy.

The importance of keeping the lines of communication open with the CAO cannot be overstated.

Listen, pay attention to detail, be curious, and always remain professional.

Focus on what your direct report requires and their preferred way of doing things.

Focus on pain points and solve the problem.

The Executive Assistant and CAO must always have each other's backs.

Take the time to learn how your boss functions (each one can be very different).

Always level up and be confident in your skills and knowledge to lead your CAO.

What tasks can you do independently to lighten your boss' load?

Build relationships with the Department Heads who report to the CAO, as well as with their Assistants.

Be a resource for them – address the small issues before they become bigger ones.

It is nice to take credit where credit is due, but it is more important to admit your mistakes - it helps build trust with your CAO.

Develop a mutual understanding of your role and what is expected of you.

Learn the signs of when something is bothering him/her, when to offer advice or an ear and when to leave them to their own thoughts.

Build relationships, learn the person first then learn their business needs.

Ensure you have clear expectations from your CAO.

Be ready to pivot, don't be afraid to ask questions, take initiative.

Never compromise your ethics.

Don't be afraid to ask questions.

All you can do is your best and your best may not look the same every day – be consistent!

Read your by-laws and policies and keep a “day planner.”

Use every experience as a learning step.

Do not rush, understand views and different angles to anticipate how things may turn out.

There is no better feeling than when your boss shines, as it means you have done your job.

We couldn't do this job without a good Executive Assistant.

Continue to learn and grow as an individual.

Know the community pulse and its players to get ahead of issues.

Schedule time with your boss to do strategic work – not just routine day-to-day work.

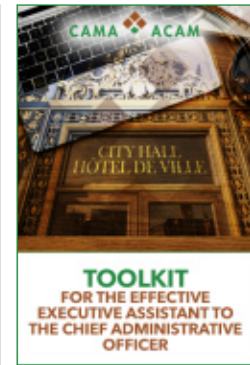
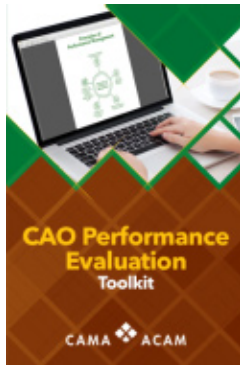
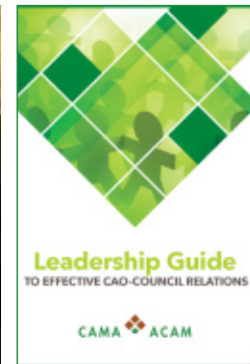
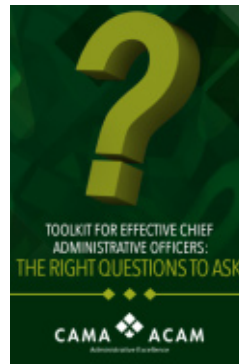
As the Executive Assistant you represent the leadership team – always be aware of your words and actions.

Confidentiality and professionalism is always required.

Bring who you are to the table. You were hired because of who you are, not who we are.

CAMA'S Toolkits

Throughout this document CAMA's suite of toolkits have been referenced. Click on each toolkit button below to link to the toolkits. The top five are in the CAMA Member's Section which you can have access to using your boss' password (if they are a CAMA Member) and the bottom five are located on the CAMA website and are for public use.



Toolkit Conclusion

Behind every successful CAO is an exceptional Executive Assistant, and you are an extension of the person that you support.

We hope this Toolkit helps guide you in your profession and that you also take some time to read the CAO Chapter that follows, which will provide you with some insight on the guidance provided to your boss on ways for them to build a successful partnership with you.

To the right is an executive summary of the "Top Ten" Skills of an Effective Executive Assistant which were referenced earlier in the Toolkit:

- ① **Excellent Communication.** Excellent communication skills and customer service are a must.
- ② **Organizational Skills & Multi-tasking.** A top-notch Executive Assistant can take a day of chaos and turn it into a well-oiled machine.
- ③ **Time Management.** How do you plan for your most productive day? There will always be busy schedules to manage and deadlines to meet, and how you can plan and know those moments is critical.
- ④ **Detail-Oriented.** Attention to detail is a key skill that Executive Assistants should have. Whether it's avoiding and correcting grammar and spelling mistakes, processing data, or organizing events, one mistake can have a big impact.
- ⑤ **Technology Savvy.** The best Executive Assistants are not afraid of new technology, and in fact, embrace it.
- ⑥ **Proactive Critical Thinking.** The strongest Executive Assistants think about the "what-ifs" and can see ten moves ahead and anticipate issues before they become full-blown problems. They can address their CAO's needs, even before they are aware of them.
- ⑦ **Adaptability in a Changing Environment.** Change is constant, especially in the CAO's Office. Executive Assistant duties often change day to day and sometimes they need to change course mid-task.
- ⑧ **High Level of Confidentiality, Trust & Integrity.** An Executive Assistant holds a high-trust position with discretion and confidentiality being so important. There needs to be mutual respect between you and the CAO.
- ⑨ **Diplomacy and the Ability to Perform Under Pressure.** A stellar Executive Assistant always seems to know what to say and how to say it in any situation, especially when they are under pressure and dealing with political situations.
- ⑩ **Professionalism.** The Executive Assistant to the CAO must represent their CAO in a positive and professional light both inside and outside of the organization - they are the spokesperson for the Office and must develop positive relationships.



**CHIEF
ADMINISTRATIVE
OFFICER
AUDIENCE**

CITY HALL
HÔTEL DE VILLE

Introduction

Executive Assistant is not just a fancy name for a secretary that is sitting outside the boss' office door – they are so much more and are sometimes known as the CAO's "secret weapon", "gatekeeper", "ears and eyes", "trusted confidante", and liaison to the senior management team.

They are your business partner, ensuring that you and the municipality meet their goals every day and are successful. Once you find a good partner, it is in your best interest to build a strong relationship based on a high level of trust, honesty, and open communication. Your Executive Assistant will then develop a strong sense of loyalty to you.

CAOs who see their role as a partnership with the Executive Assistant are often the most successful, as the success of the CAO is a reflection on the Executive Assistant and vice versa.

When the Executive Assistant is treated as an equal to the CAO, rather than as a subordinate, they feel more appreciated. It is also important to make your Executive Assistant a member of your executive leadership team since they will often have the authority to speak on your behalf and stand up and take the lead when a situation requires it. This sends a clear message to your leadership team and the rest of the employees in the organization, and provides the Executive Assistant with more respect, which is often overlooked in this undervalued position. There needs to be a greater understanding of the influence that the Executive Assistant has **without the big title**.

Having appreciation for the role of the Executive Assistant in local government, the Board of the Canadian Association of Municipal Administrators (CAMA) former a committee to recognize the important of this position.

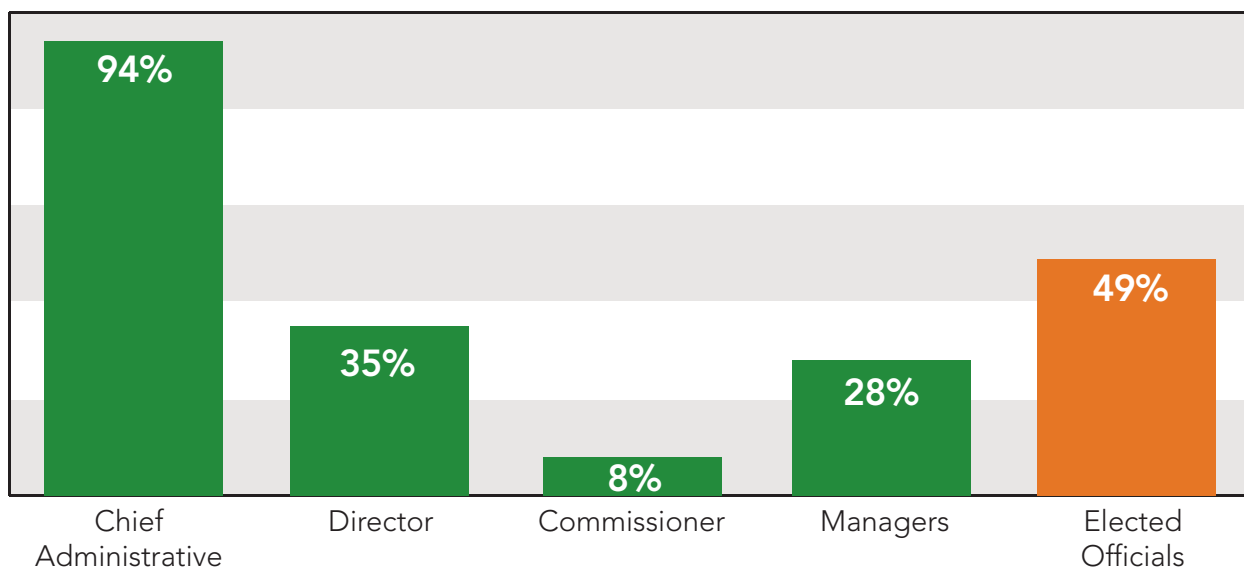
The **Toolkit for the Effective Executive Assistant to the Chief Administrative Officer** is the result of the efforts of this National Committee, led by Jennifer Goodine (CAMA Executive Director and former Office Administrator to a CAO and Mayor) comprised of Executive Assistants that work or have worked with CAOs and direct reports across Canada from all size municipalities. This Toolkit will help Executive Assistants understand how they change their community every day, gain a new perspective on their role and the many benefits that they bring to the Chief Administrative Officer and the organization, highlighting this position across the country.

The Board believed that it was also important to include this chapter for the CAO audience to provide you with some guidance on ways to build a partnership with your Executive Assistant. The topics range from the hiring process (with a sample job description, posting, and interview questions), a business case to your Council if you don't currently have a staff member in this position, to finding the right personality and fit. There are also some tips on how to foster a healthy working relationship with your Executive Assistant by communicating often, providing performance evaluations, supporting their professional goals, and delegating more so you can concentrate on the higher-level strategic direction of the organization and keeping the Mayor and Council satisfied.

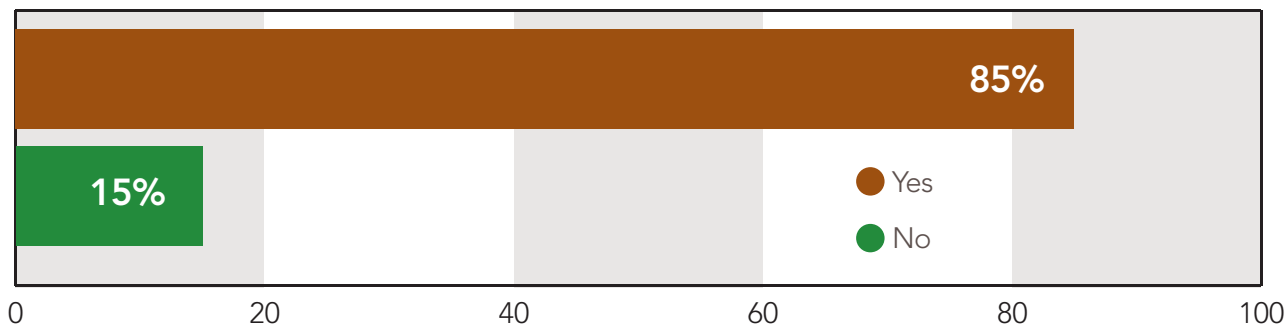
It wouldn't have been possible to create the Toolkit without the support of you, our members, and your Executive Assistants, who completed our 2022 CAMA Survey. Hearing from both sides, you will see many of the results noted throughout the Toolkit to provide you with a Canadian perspective on the Executive Assistant to the CAO role.

In the survey, 94% of the Executive Assistants indicated they provide administrative support to the Chief Administrative Officer, 35% to the Directors, 28% to Managers, and 8% to Commissioners. **However, 49% also work for both the CAO (and other members of the senior management team) and the elected officials.** The data indicated that 85% of CAOs have Executive Assistants that also provide support to other staff or elected officials in the organization. This recognizes not only the importance of the position to the CAO, but also to other individuals that the Executive Assistant provides administrative and executive level support to.

Q9 To whom in your organization do you provide administrative support? (Choose all that apply)



Q5 In addition to you, does your Executive Assistant provide support to other staff or elected officials?



The Top Ten Ways a CAO Can Effectively Use Their Executive Assistant to Improve Their Productivity

A Day in the Life of a CAO: The Mayor is calling, a Councillor is standing outside your door, you are late for a senior management meeting, there was a watermain break, a structure fire, the media wants an interview, and your son needs to be picked up at school because he's sick – just to name a few of the things that can happen each and every day.

As a CAO, using your Executive Assistant effectively and delegating is one of the most valuable ways to improve your productivity and better balance priorities. They are there to make your life easier and want you to be as successful as possible. Being clear and providing the basics, sets both up for efficiency and success.

“The Executive Assistant to the CAO - Making the Impossible....Possible”

- 1 **Help Them Understand Your Municipal World.** Whether they are new to the municipality and to their role, or have been there for their entire career, every Executive Assistant needs to know how you and the organization operates. Share your knowledge about local government, how the office works, and how the organization operates.
- 2 **Share Your Specific Preferences.** Your Executive Assistant needs to know your specific preferences so they can complete your tasks better than you can yourself. Be upfront about everything from what type of restaurants you like for lunch meetings, what meeting room you prefer, the specific font you use for letters and e-mails, etc. This information can be kept in a checklist for future reference.
- 3 **Communicate Daily & Effectively.** An expert Executive Assistant will learn to anticipate your needs, but they don't read minds. Communicate your expectations and share information with them **daily** to ensure they have what they need to make decisions on your behalf. Be available when they need you and keep them in the loop.
- 4 **Be Honest and Clear About Your Expectations.** Honesty goes a long way with any employee. Tasks need to be presented concisely and expectations clearly set in the beginning.
- 5 **Give Constructive Feedback.** If you don't provide constructive feedback shortly after the mistake it will never get corrected. Executive Assistants work hard every day to help you be successful, so provide them with specific details on how you would like them to improve and encourage them to ask questions. Conducting an annual performance evaluation is also expected.

- 6 **Delegate.** If you have a new Executive Assistant, it may be difficult for you to determine what to delegate. Start with the ongoing tasks like scheduling your meetings, managing your travel, creating reports and agendas, etc. and move on to delegating authority to make decisions on your behalf when you feel comfortable.
- 7 **Build a Respectful & Trusting Relationship.** Act with a level of respect that you would expect to receive - they are a professional with professional experience just like you. Plan to meet regularly with your Executive Assistant to provide updates on all aspects of the organization including the political nuances. This will allow them to be able to navigate through any situations very quickly having the knowledge and background ahead of time.
- 8 **Show Your Gratitude, Appreciation & Support.** A great Executive Assistant makes you look good so be generous with praise when it's due. A simple "great job" goes a long way. The days get busy, but take a moment to check in with them and get to know them both professionally and personally to make sure they are doing okay. Also, supporting their professional development goals and providing them with the right resources in the right places helps them succeed.
- 9 **Inclusion.** Treat them as part of your leadership team and include them in important meetings so they have the high-level knowledge of what is happening in the organization. Always involve them in the decision-making process as there are times when they can offer great value with a seat at the table. They often have a lot of insight into issues being the "eyes and ears" of the organization and can provide a different perspective for the CAO.
- 10 **Don't be a Bottleneck.** Your Executive Assistant's job is to speed up the flow of work in and out of the CAO's Office. If things aren't moving quickly enough, the Executive Assistant will bear the brunt because nobody complains to the CAO when they can complain to the Executive Assistant. Ensure that you make it a priority to sign off documents, review Council reports, and complete any tasks on a timely basis.

"The Executive Assistant role is imperative to any successful organization. I often compare their role to being like the wheels on a bus, and our leaders are the bus itself. Without its wheels, a bus cannot move!"

-Executive Assistant

Tips For The CAO in Hiring an Executive Assistant

In addition to finding the right fit for the organization, our CAMA members told us the most important characteristics that they look for when hiring a new Executive Assistant are excellent communication and organizational skills, loyalty and trust, professionalism, the anticipation of their needs and preferences, and working independently, always with a positive attitude.

This means they are not constantly relying on the leader's direction for every little task they need to perform. This also is a testament to the CAO delegating authority to the Executive Assistant. One CAO stated that "an Executive Assistant must have a servant's heart" - truer words were never spoken.

A Business Case to Hire an Executive Assistant

Many small municipalities are unlikely to have an Executive Assistant position due to limited financial and human resources. This translates into the CAO having to do the administrative tasks in addition to his/her regular duties. Have you reached the point where you simply don't have enough hours each week to get everything done, and hiring an Executive Assistant may be a great solution to your problem - and Council may be open to the idea? If this is your status, we have provided you with a sample [Business Case Template](#) to present to your Council outlining the position and how it would assist you in focusing more on staff and Council's strategic priorities.



How to Hire a Great Executive Assistant

Top Characteristics of a Great Executive Assistant

Hiring the right Executive Assistant can be a challenge as the one-on-one dynamic is so important - sometimes more so than the skills or experience. Good Executive Assistants will pay close attention to the boss' behaviour and learn what they need, what their strengths and weaknesses are, and how best to accommodate their personal style. The Executive Assistant is "the face" of the CAO's Office and they represent senior leadership.

In the 2022 Survey, CAOs were asked to list the top three characteristics they valued most in their Executive Assistant.

This list of the "Top 10" is almost identical to what the Executive Assistants told us about the skills they feel are most important in their job:

- ① Excellent Communication
- ② Organizational Skills
- ③ Detail Oriented
- ④ Time Management
- ⑤ Critical Thinking/Proactivity
- ⑥ High Level of Confidentiality
- ⑦ Ability to Work Independently / Self-Driven
- ⑧ Adaptability in a Changing Environment
- ⑨ Professionalism
- ⑩ Trust and Integrity

Information Technology Skills, Multi-tasking, Diplomacy, and the Ability to Perform Under Pressure were also mentioned by the Executive Assistants in their "Top 10" list. These characteristics were noted by the CAOs as well but didn't rise to the top.

The Hiring Process

If you need to hire a new Executive Assistant here are some tips to help navigate the process:

- 1 Think about your requirements.** To determine the qualifications that you want in an Executive Assistant, review the above-noted “Top 10” list but also think about what level of administrative assistance you require based on your needs. Do you need an assistant that does basic administrative responsibilities, one that handles those tasks but also assists with projects, preparing for meetings, scheduling travel logistics, etc., or one that can fill a more strategic role by providing objective advice, participating in meetings, spearheading projects, and managing important assignments all on your behalf. It's important that you choose the type of person that you need based on the support that you require, and the expectations are set from the beginning.
- 2 Advertise the position.** Now that you know what level of an Executive Assistant you require, you need to write the job description and prepare the job posting advertisement with the assistance of your Human Resources Department (if you have one). Posting the job locally but also on multiple job sites will boost the presence. Included in this Toolkit is a sample [job description](#) and [job posting](#).
- 3 Review of Job Applications.** This task may be completed by the Human Resources Department, however you may also want to be involved in the screening of the applicants. Don't be surprised if you receive interest from unqualified candidates that don't have any Executive Assistant experience. You may or may not want to train someone from scratch, but you may also miss out on an ambitious candidate that is willing to learn. LinkedIn is also another recruitment channel to consider Executive Assistants who are not currently looking for a job but may be interested if they are sought out and you are impressed with their profile and skill set.
- 4 Arranging Interviews.** Your Human Resources Department (if you have one) has experience in studying resumes, screening candidates, arranging interviews, and asking the right questions. Letting them handle these initial steps will save you a lot of time. [CAMA's Human Resources Toolkit](#) also provides some great tips.



How to Finetune the Job Interview Questions

When it comes to the in-person interview, make time to properly prepare. After all, you'll be working closely with the person you choose so you will want to find out as much about their skills and poise as possible. Fashion your questions in a way to elicit the most revealing answers. CAMA has provided you with a sample set of [interview questions](#) in this Toolkit specific to the Executive Assistant to the CAO position, however, here are some additional questions for your consideration:

- ① What kind of work environment brings out your best performance?
- ② How would you describe your ideal boss?
- ③ What appeals to you about our organization and this Executive Assistant job?
- ④ Can you tell me about a workplace conflict you were involved in while in an administrative role and how you handled it?
- ⑤ How do you go about learning new software programs and keeping up with technology?
- ⑥ How do you anticipate the needs of the senior leader you're supporting?
- ⑦ Tell me about a project you are particularly proud of managing.
- ⑧ Why are you leaving your current job?
- ⑨ How would your co-workers describe you as a team member? As a team leader?
- ⑩ What have you done at your current company to save time or reduce costs?

Finding the Right Personality and Fit

Hiring the right Executive Assistant can be a challenge. In some ways it's trickier than filling one of your senior management positions, because personal chemistry and the one-on-one dynamic are so important - sometimes more so than skills or experience. You should be directly involved as one of the interview panelists, as you are choosing your work partner. As noted, some candidates may be very qualified, with many years of experience working in the Executive Assistant role, however, may not have the right personality for your leadership style and the organization. Some may have less experience, but you "click" with them which is promising for a good future partnership.

While the requirements and preferences that you listed on the job posting for your new Executive Assistant should serve as your guide throughout the interview process, you need to rely to some degree on your gut. Is this a person who can be a true partner to you? This is the most important, as your relationship with your Executive Assistant will be the secret to your success as a CAO. While you want to find someone with a personality and work style that's consistent with your own, you may also want to think about the skills and qualities you don't have, to create some balance in the relationship.

Your Executive Assistant doesn't just manage your calendar and book your flights - he/she is your partner that will keep you balanced as you both maneuver through some chaotic days in your municipality. Working with someone so closely and in such diverse ways calls for a professional who is a good communicator, troubleshooter and problem-solver who uses their discretion on confidential matters - all without any direction from you. They help you read and understand the organizational culture, guide you through different (and difficult) personalities, and serve as a sounding board. They are reverse mentors, using their experience to teach you.

Expert Executive Assistants understand the CAO's unspoken needs and have high levels of emotional intelligence. They pay close attention to shifts in their boss' behaviour and temperament and understand that timing and judgment are the foundation of a smooth working relationship. Good matches are hard to come by and that's the reason why so many good assistants will follow their boss from job to job. Simply put, the best Executive Assistants are indispensable.

Given the new hybrid working environment, you should also take into consideration the fact that communication will be essential using all the tools of modern technology.

Identifying an Executive Assistant who is the right fit can be challenging, but taking the time to find one will increase you and your leadership team's productivity and job satisfaction and reduce stress - the key to any CAO's daily life. You both may have different goals, but you know where you are headed, which means a positive impact on the entire community.

Helpful Resources

- [Sample Business Case Template to Council for Hiring an Executive Assistant](#)
- [Sample Job Description of an Executive Assistant to the CAO](#)
- [Sample Job Posting of an Executive Assistant to the CAO](#)
- [Sample Interview Questions for Executive Assistant Position](#)

"Don't ever take responsibility for anyone else's emotions or take it personally. If your CAO, Mayor, or Director seems upset one day, it's likely nothing to do with you."

-Executive Assistant

Creating a Partnership With Your Executive Assistant

How to Create a Dynamic Partnership with Your Executive Assistant

"Communication is key. The CAO needs to have complete trust and faith in that the Executive Assistant is fully capable to 'run the office'."

-Executive Assistant.

"A good Executive Assistant should be able to anticipate what you need before you know what you need – that can only be possible if you bring them up to speed on what is happening. There needs to be trust and confidence in your Assistant's capabilities."

-Executive Assistant

The Importance of the CAO - Executive Assistant Relationship

The importance of the Executive Assistant/Chief Administrative Officer partnership cannot be overstated.

This Toolkit was written to support the Executive Assistant and his/her Chief Administrative Officer/CAO (or other Senior Executive), as they navigate and support their community and organization.

A solid partnership and a smooth-running office is a reflection of both the Executive Assistant and the CAO communicating regularly, and being aware and on top of what is happening in the organization - this speaks volumes to a successful office.

Reviewing the findings from our national survey, it was obvious that the Executive Assistant was not always in the loop or getting the CAO's undivided attention. We know the municipal world/business is a busy one, important business matters are happening constantly, reports need to be written, read and approved, presentations are constantly on the forefront, not to mention our residents and elected officials need the CAO's full focus, always. Every attempt should be made to find time to build that CAO/Executive Assistant relationship.

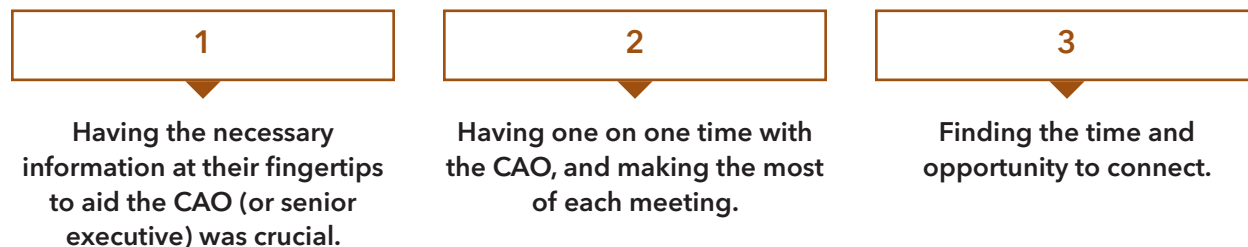
The CAO's **acknowledged** that the

"Executive Assistants need to know that their position is extremely important to the organization, they typically have their finger on the pulse of everything happening in the Mayor and CAO's Office(s), and their role is instrumental in the success of the administration office".

The Executive Assistants were asked "what is the most challenging aspect of being an Executive Assistant to the CAO (or other Senior Executive)?"

Recognizing that it can be a very demanding and stressful work environment, both the CAOs and Executive Assistants agreed that they have demanding workloads, and at times, managing and balancing multiple priorities and tasks simultaneously can become overwhelming. It was also noted that dealing with the public and elected officials can sometimes be difficult. Executive Assistants mentioned that managing multiple people who have different requirements/service level needs and **understanding how things piece together is extremely important to their success, "always being in tune to the pulse of the organization and being aware of any issues that could erupt into problems".**

The Executive Assistants are always anticipating what will be required next? **The top three asks that we heard** were:



So, whether you found your person and just hired a new Executive Assistant or you have been fortunate enough to have had your Executive Assistant for a number of years - here are some tips on how to support each other and communicate with each other whether working remotely or side by side.

- **Be good communicators.** Whether it's in person or by phone, e-mail or text, quality communication is key in an effective partnership. If it's a message that can't be put in writing or could get crypted, set up a Teams call or pick up the phone.
- **Delegate Authority.** We will talk about delegating authority in more detail later in this chapter, however, encourage your Executive Assistant to take initiative and offer their high-level administrative and strategic support.

Why Meeting Regularly Works

PROS

Take some time to reflect on your goals; both the CAO and Executive Assistant must be clear as to what they need or want to accomplish in the upcoming year.

Ensure the Executive Assistant is in the loop of the CAO's timelines (i.e. personal vacation, conferences, training plans.) These all make for seamless planning and smooth calendar scheduling.

An Executive Assistant needs to be heard, respected and trusted, and we heard from you, that they are the "ears and eyes of the organization", "they have the pulse on what is happening". Let them share and trust them.

An Executive Assistant supporting both the CAO, and the Mayor and Councillors Offices can read the political versus corporate pull and differences. He/she can assist in workloads that stem from two very busy offices. Meeting regularly with the CAO results in being in the loop of a potential matter(s) escalating.

Meeting regularly and establishing clear rules and expectations helps everyone "to continue to be one step ahead".

Setting boundaries, working together as a team by committing to building and maintaining a working relationship, "striking a balance".

Meeting regularly can bring important matters, e-mails, meetings, and documents to the forefront early.

CONS

Confidential/sensitive matters could be difficult for the Executive Assistant to understand and/or handle. In some cases, we respect the CAO (or Senior Executive) cannot share everything.

An Executive Assistant that is not in the loop will spend more time (wasting his/her time) rescheduling and juggling calendars.

CAMA members wrote "Executive Assistants working unselfishly, not needing credit". Yes, this might be true but meeting with your Executive Assistant on a regular basis and simply saying thank you and acknowledging a good task goes a long way.

If a CAO is not keeping his/her Executive Assistant in the loop, what does that say to him/her? The CAO is not utilizing their Executive Assistant's full potential.

If you are not meeting regularly how can the Executive Assistant ensure the CAO has sufficient time to concentrate on "strategic planning, budget, deadlines and capital projects". This could result in the CAO feeling overwhelmed and taking work home, more often than maybe necessary.

Not meeting regularly results in increased stress on both ends, chasing deadlines, rushing through important documents, and maybe even missing an important step.

Some Executive Assistants find it intimidating speaking to CAO's (or Senior Executives) especially if they are new to the role. Make them feel comfortable and welcome to share their thoughts.

Advice on Meetings with Your Executive Assistant

Some advice on meeting with your Executive Assistant:

- Don't cancel your one on ones - these meetings are just as important as your other ones.
- Keep them short and frequent, for example, in the morning or the end of the day for 15-minute daily check-ins.
- Your Executive Assistant may prepare a short agenda with their top asks, and you can do the same. Don't deviate from the list.
- Put your Executive Assistant first.

The result will be a well-informed CAO (or senior executive) and his/her Executive Assistant, working seamlessly; after a few months of regular check-ins (not to mention a few years), the partnership becomes stronger. You will also feel less overwhelmed when attending meetings as you are better informed by the Executive Assistant of what is going on.

Including your Executive Assistant makes them feel supported and like they are "helping others be successful" and "making the impossible, possible!".

"Help your Executive Assistant understand your world and share your specific preferences with them so they can make decisions on your behalf. Provide frequent constructive feedback."

-Executive Assistant

"Rarely is an Executive Assistant praised for all they do, and rarely do they seek pats on the back - it often is a thankless job. The reward is knowing that all the effort and dedication contributes to a successful outcome."

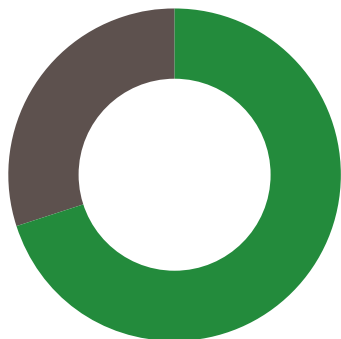
-Executive Assistant

The Importance of Having a Performance Evaluation with Your Executive Assistant

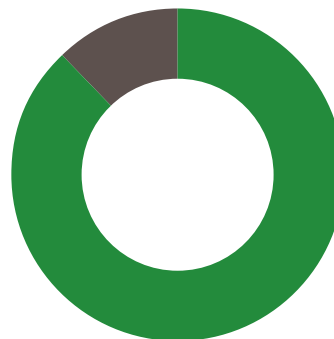
Just like regular performance evaluations are important for the CAO by the Mayor and Council - they are also equally as important for you to conduct one for your Executive Assistant. This will provide you with an opportunity to increase communication, identify goals to support their career objectives, and show appreciation for, and feedback on their work. It will also provide you with an opportunity to recognize and hear about any challenges that they are facing, and like the CAO and Mayor and Council - this should be an **"ongoing process - and not just an annual event"**.

When it comes to setting performance goals, Executive Assistants may have a difficult time establishing objectives since they are involved in so many areas of work within the organization. This Toolkit provides you with a sample [performance evaluation template](#) that assists with this discussion.

The response from the survey was extremely positive.



77% of the Executive Assistants received an annual performance evaluation.

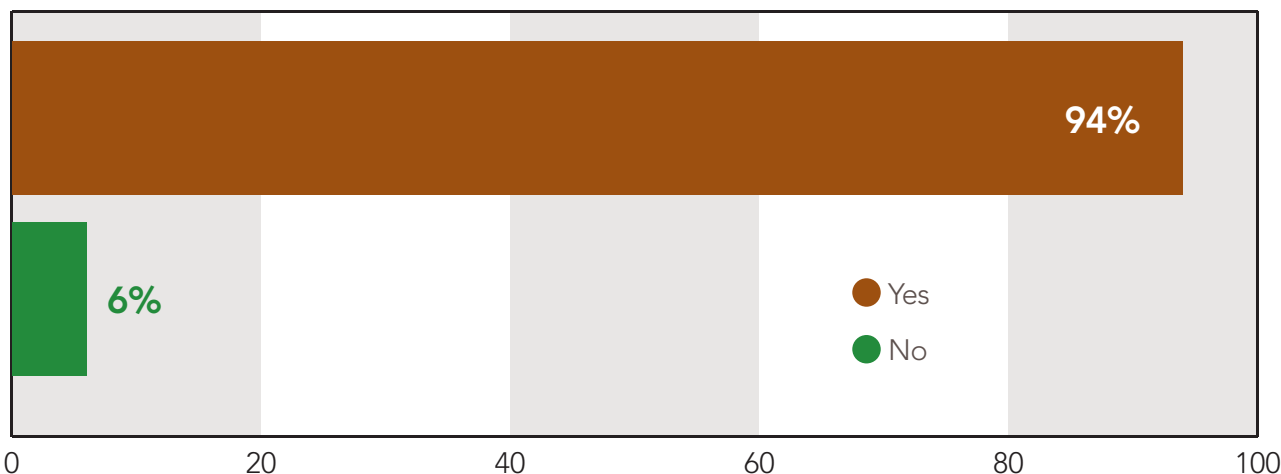


88% of the CAOs provided an annual performance evaluation.

How Can You Help Your Executive Assistant Grow and Develop?

Ninety-four percent (94%) of the CAO survey respondents indicated that they provide their Executive Assistant with a training budget each year to pursue education. The training budgets noted ranged from \$600 to \$10,000 with the average being \$3,000.

Q8 Do you provide a training budget for your Executive Assistant to pursue education each year?



Executive Assistants may be interested in learning about more than just their job so they can ultimately move into other roles within the organization. They may be interested in one day becoming a manager or CAO themselves and you can be the best mentor to them. Remember that the Executive Assistant's job responsibilities are different today than they were thirty years ago – they are rapidly changing, and helping them develop their talents and potential are extremely important for both their personal and professional development.

“For me, the most rewarding aspect of being an Executive Assistant is that I have an amazing boss who I respect and who is invested in my success and progression within the organization.”

-Executive Assistant

In the survey, we asked the Executive Assistants what would help to improve their skills and it was evident that they appreciated more training on the following topics:

- **Executive Assistant Courses.** General administration, business administration, office management and business acumen.
- **Leadership Training.** Managerial courses, the art of supervision, how to think outside the box and how to delegate to others, confidence building, stress management, critical thinking, emotional intelligence, and developing resilience during times of change.
- **Communication.** Customer service, public speaking, communicating with authority, effective listening, social media, decision making, and writing.
- **Project Management.** An Executive Assistant manages projects every day on behalf of the CAO. This is a great skill to have.
- **Relationships.** Relationship building with others in the organization, dealing with difficult people, conflict management, having difficult conversations, assertiveness training, and diffusing difficult situations.
- **Time Management.** Training courses on how to get the many tasks done in a more efficient way.
- **Minute Taking.** Having the ability to take minutes confidently for Council or senior leadership meetings is important.
- **Technology.** MS Word, Excel, PowerPoint, Microsoft Suite, Office 365, social media platforms, and website training.
- **Records Management.** Digital record keeping and record management training.
- **Writing.** Grant writing, report and letter writing, and presentation skills.
- **Organizational Skills.** Task management and how to manage time and priorities, structure, discipline, and multi-tasking.
- **Human Resources.** Organizational behaviour, change management and introduction to human resources courses.
- **Event Planning.** A large part of an Executive Assistant's job is in planning events so a course might be helpful.
- **Local Government.** Understanding by-laws and policies, Diversity, Equity & Inclusion, NACLAA courses, political acumen and professionalism with Council, *Municipal Act*, Roberts Rules of Order/parliamentary procedures, Council meeting regulations, *Freedom of Information and Protection of Privacy*, zoning/planning and development, budgeting, strategic planning, policy development, local government procedure training, general legal information, and learning about different levels of government.

Some Executive Assistants are on their own learning journey and appreciate an annual training budget each year, and welcome networking opportunities with their colleagues in their own Province or Territory or across the country. Others also love to learn new skills on the job through their daily experiences, in-house training, coaching and mentorship. Learning will improve their performance in their current job and prepare them for their future. Providing them with the right resources in the right places helps them succeed.

Be proactive and ask your Executive Assistant each year during the budget process if there are any conferences, webinars, or on-line courses that they would like to participate in. CAMA provides a great [List of Executive Assistant Programs, Resources and Training Tools](#) which includes Conferences that are offered across the country - both virtual and in-person. It may be difficult for you to be without your Executive Assistant for a few days, but keep in mind that his/her learning also benefits you, and the return on investment from a skilled employee can be substantial. It's important to keep their skills current.

In a fast-changing work environment, skills become obsolete. One area that Executive Assistants need to stay ahead of the curve on is with information technology so they can assist you when you need it. The best Executive Assistants are not afraid of new technology and in fact, embrace it. They will routinely look for tools and resources to streamline communication processes and fix inefficiencies in the office. When things go sideways technology-wise, an Executive Assistant rarely has time to wait for IT to fix things. The ability to trouble shoot for you, the boss, is a must-have skill. Therefore, having a strong handle on the latest trends is also critical so they are prepared for any tool that is introduced to the organization.

Having said that, it is important to request that your Executive Assistant and the Assistants in the other municipal departments are trained first on any new software programs, Outlook, meeting technology, etc. to ensure that they know how to use it at the outset, so they have the expertise to assist you and the management team. The CAO's Office must remain up to date on modern technology which can easily become outdated.

Flexibility and the willingness to embrace change are important traits of Executive Assistants, so give them the tools to help them deal with many different opportunities and settings that they face daily. Help them support you.

"I would ask any CAO or senior executive to pass along any resources that they found helpful for themselves; whether it is a training course or reading material, having that general understanding of their workload is very helpful."

-Executive Assistant

The Executive Assistant to the CAO will inevitably experience a certain amount of distance from their colleagues as they are often viewed as a member of the executive team and the boss' secret agent. It's not personal - it's just part of the position. Having said that, sometimes Executive Assistants isolate themselves from the opportunity to network because they work in the "top office". At the same time, this negative behaviour deprives them from learning and growing and in turn, providing better support to the CAO.

Encouraging your Executive Assistant to create an internal network in the organization with the other Executive Assistants will help build morale, provide networking and a forum to share best practices within the organization. Also, you may wish to introduce them to other Executive Assistants within municipal government that you may know across the country through your CAMA network.

Lastly, encourage them to ask you questions if they need clarification or are unsure of something that you have requested, and let them know how much they are valued - which will go a long way towards improving their confidence in their role.

"An Executive Assistant career is a great one. You will always be involved in very exciting endeavors, and it is hard work but so rewarding. It is a step to something more if you choose that path."

-Executive Assistant

Being a Role Model for Work-life Balance

Work-life balance for an Executive Assistant can be challenging at times, as they are often not necessarily nine to five jobs, so there are times where one goes beyond the call of duty. We asked the Executive Assistants what they do for work-life balance, and it was apparent that they do a great job at setting boundaries between their personal and professional lives, take their vacation, practice relaxation and self-care, exercise, enjoy nature, travel, spend time with their families, and enjoy a flexible work schedule.

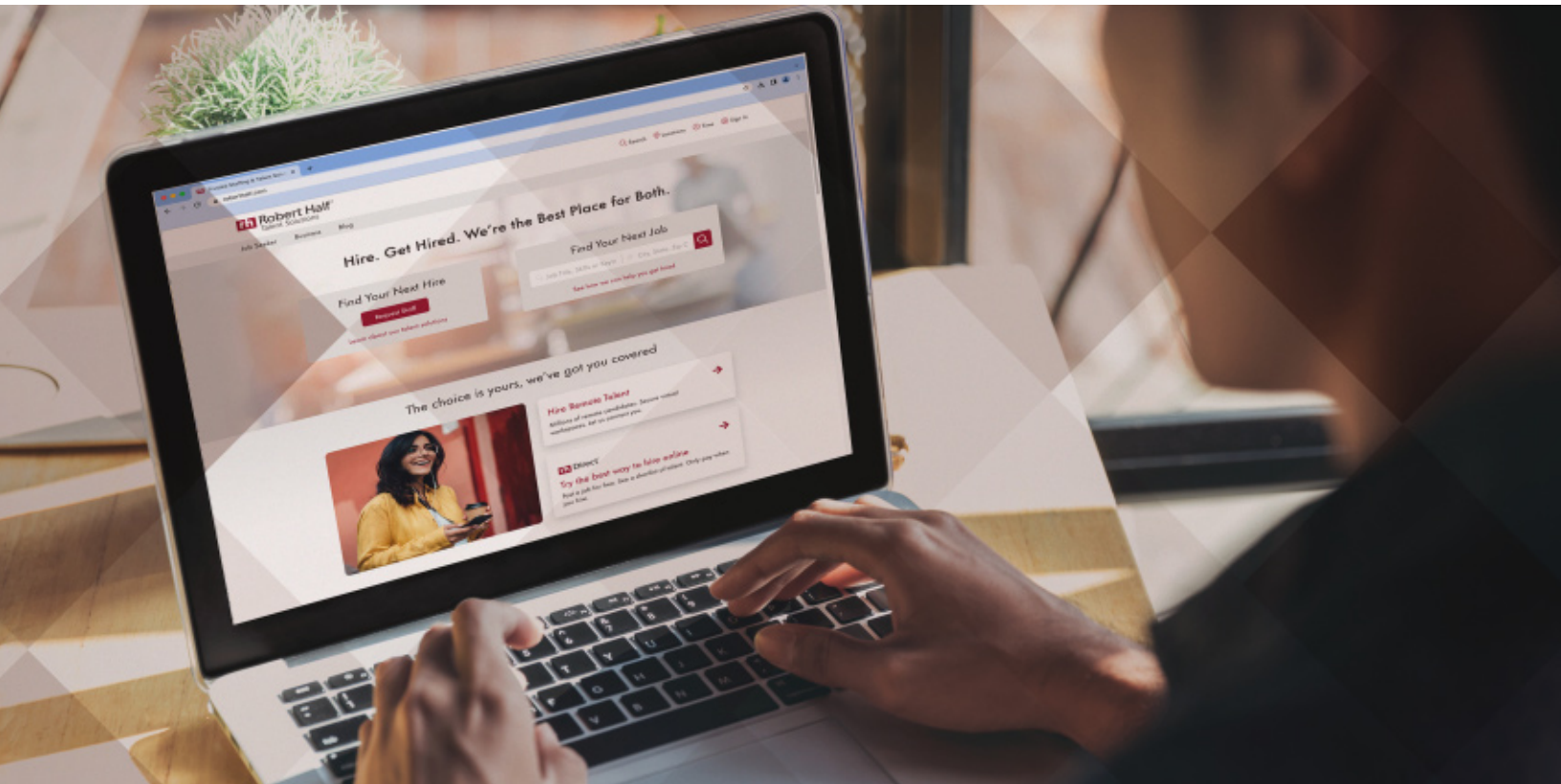
Support from the CAOs was appreciated to ensure Executive Assistants achieved a healthier work-life balance.

"Leave the job when I leave the office. I'm dedicated to my professional goals and obligations while I am at work and equally as dedicated to my personal goals and obligations while I'm not at work. I rely on the support of my manager to ensure this is possible."

-Executive Assistant

"My CAO is incredible at ensuring I am aware that there is no expectation to work through lunch, stay late, etc."

-Executive Assistant



Many survey respondents attributed their work-life balance to the newly introduced hybrid work schedules including a compressed work week, working from home one to two days per week, and a flexible work schedule.

Robert Half Management Resources offers four tips to support the Executive Assistant in achieving a work-life balance:

- 1 **Know what your employees are striving for.** Not everyone has the same work-life balance goals. Talk to each employee about their objectives, and then determine what you can do to help them. Some employees may benefit from working remotely a couple of days each week, while others may prefer altering their daily work schedule. It's important to be open-minded and flexible.
- 2 **Set a good example.** Your employees follow your lead. If you send e-mails at all hours of the day and night or work hard on the weekends, your staff may think that is what is expected of them as well.
- 3 **Let employees know what their options are.** While employers typically do a good job of highlighting their work-life balance offerings to prospective job candidates, the same can't be said for communicating those initiatives to current employees. Regularly discuss with your employees the options that are available to them. Also, sit down with soon-to-be parents and discuss parental leave options.
- 4 **Stay at the forefront.** It is important to keep ahead of the curve on emerging work-life balance trends. What works today for employees might not be a good fit a year from now. Keep your work-life balance initiatives fresh and offer in-demand benefits. Plus, consider offering work-life programs.

How to Foster Healthy Working Relationships

Executive Assistants display high levels of loyalty and dedication. They won't always agree with the CAO's decisions, but their steadfast loyalty to you and their belief in the importance of the working partnership will ensure that they continue at their best. It's important that you know that you can trust them with confidential information that they need to do their job at the highest level.

Boss' must be open regarding their expectations of the Executive Assistant from the beginning.

The hard skills are a given in the Executive Assistant profession, but things like confidence and resourcefulness are intangibles that make this role's impact so much more valuable to an organization. The mindset of a successful Executive Assistant is invaluable. They need to be able to not only do their job, but push their CAOs to another level professionally. They need to have the courage to share their opinions, and the strength to protect their CAO's time. Their focus is to maximize the time and output of their CAO, and that comes from providing them with the best work environment possible.

Prioritizing the CAO's schedule to the essentials, making sure they are mentally prepared for meetings and challenges, and really going the extra mile to do as much as they can to allow the CAO as much time to do the things that only they can do. That confidence, consideration and camaraderie builds a foundation for a massively successful working relationship with the CAO and makes the Executive Assistant an invaluable asset to the team.

"Reporting to a high-up official can be intimidating – It's hard to say no".

-Executive Assistant

How to Delegate Wisely

Your willingness as the boss to delegate pieces of your work to your Executive Assistant and their willingness to take on more responsibilities are two key factors. They will take on these responsibilities with a high level of confidence and resourcefulness. Share your thoughts and opinions regularly with your Executive Assistant and depend on each other to solve problems and achieve results.

If you are new to your role as the CAO, your Executive Assistant can be instrumental in helping you navigate the first few months. They become a critical on-boarding resource, helping you maneuver through a variety of new situations and reading the organizational culture, introducing you to Council and staff, and providing you with insight on the inner workings and different (and difficult) personalities of the organization. Never underestimate the power of knowledge.

Younger CAOs have grown up with technology and are self-sufficient, so have become accustomed to doing their own administrative work and don't require an Executive Assistant for this purpose. If this is you, maybe think of your Executive Assistant as a strategic advisor and involve them in other initiatives in your office such as managing teams, leading meetings, overseeing projects – just to name a few.

Some things that you can delegate to your Executive Assistant would be as follows:

- The Executive Assistant should sit in on phone calls and participate in meetings to listen for anything that needs to be done or followed up on. It is the Executive Assistant's job to ensure that promises made by the CAO are promises kept.
- Managing the information flow that comes into the CAO's Office, drafting and responding to e-mails on your behalf, financial and budget management, and taking on a more supervisory role. This tells the Executive Assistant that you trust them representing you to make decisions.
- Reviewing many decisions with your Executive Assistant before you finalize them. They can read complex settings and circumstances in the organization that you may not be aware of.
- Treat your Executive Assistant as a member of your Executive Leadership Team.
- Delegate higher level work to your Executive Assistant.

Also, in our survey, we learned that more Executive Assistants are taking on more supervisory roles. They have a team of other Executive Assistants in the CAO's Office or throughout the organization and have real authority from their boss to represent them and make decisions.

You can often tell a lot about a CAO's management style from the way he/she interacts with their Executive Assistant. Does the CAO trust and delegate, or does he/she micromanage? Do Executive Assistants like working for that CAO, or is there a history of a revolving door?

"Delegate tasks to the Executive Assistant – we are here to make your job easier."

-Executive Assistant

"Let us help you!! We know you are extremely capable, but we can help you and free up some of your capacity and schedule so you can focus on the community as a whole."

-Executive Assistant

"Trust them in their role, you hired them for good reason."

-Executive Assistant

"Someone in this role is typically hungry for challenge. The more opportunity you give your Executive Assistant to assist you, the more valued they will feel. The best thing my boss has ever done is trust me to do things that were challenging. It gave me a chance to prove to not only myself, but to my employer, that I was capable. And that snowballs into better and better service and frees the CAO to do the high-level work that they need to do."

-Executive Assistant

“Delegate – they can take on more than you think!” Freeing up the most precious commodity – your time!”

-Executive Assistant

“Let them manage your calendar! Don’t complain that you are too busy/fully booked when you have accepted all the meetings!”

-Executive Assistant

“Let staff who are professionals do their jobs. Don’t undermine or micromanage.”

-Executive Assistant

“Delegate with expectations clearly laid out, trust your staff, empower them to make decisions.”

- Executive Assistant

“Showing confidence in an Executive Assistant and keeping them involved empowers them to build their own confidence and be engaged.”

-Executive Assistant

“Download to ease workload....this is a team!”

-Executive Assistant

Getting the Most from Your Executive Assistant

“Executive Assistant’s are there to make the CAO’s look good and can be your best asset.”

-Executive Assistant

In the survey, we asked the Executive Assistants “What advice would you give a CAO (or other senior executive) to make the best use of their Executive Assistant?”

It is very apparent that communication and trust is the key in building a strong relationship with your Executive Assistant, as well as meeting with them on a regular basis and keeping them in the loop on all happenings in the organization and community. Delegation, not micromanaging, being open to their opinions and insights, and giving them authority is also the key to a successful relationship with the Executive Assistant - it also doesn’t hurt to check in on how they are doing and ask if they require any training or resources to do their job better.

It is important to treat your Executive Assistant as part of your leadership team and not a glorified secretary. Make sure your Executive Assistant is involved in every aspect of your role and make it well known that your Executive Assistant is an extension of you as CAO, so others view the position with respect and an understanding of responsibility to report and follow direction if direction is given. Treat your Executive Assistant well as they are your best support in the office and will have your back when others won’t. They are your closest team member, your confidante, and your best resource.

Never underestimate the value of your Executive Assistant’s opinions and insights. He/she often has a lot of insight into issues being dealt with by senior management or other employees - they are the “eyes and ears” of the organization. Tapping into their experience and showing respect for it will build your relationship. Always include them in the decision-making process as there are times where they can offer great value with a seat at the table.

When you are building your relationship with your Executive Assistant, give them permission to disagree and discuss matters with you in a respectful manner. They will learn a lot from those discussions, look at things from a different perspective, and understand what your thought style is to accurately reflect any decisions that need to be made on your behalf.

The Executive Assistants provided the following advice to the CAOs:

"Be clear on your directions and expectations." For example, "I want you to respond to these types of e-mails on my behalf without checking..."

"If there is something the Executive Assistant is lacking suggest it right away and not wait until evaluation time as they need to know sooner than later if there is something they need that they are not getting. It is very important to have a close working relationship with each other and if it isn't working changes need to be made right away."

"Build a relationship of give and take, it is just the two of you so trust matters so much."

"Don't be afraid to give me a list of work. I won't be overwhelmed and then will always feel like I'm doing what you need/want."

"Be a team – don't just acknowledge errors, but also any positives."

"Be available when you need them – don't brush them off as often the work requires your input."

"Build strong working relationships. I cannot stress the importance of it enough, the more effective the Executive Assistant, the more effective the CAO...and the more effective the organization, Council, and the community. Working as a team is so much easier and productive than 'lone ships'".

"Use your Executive Assistant! If used effectively, they can help alleviate your workload and help you better balance priorities. They also have their ear to the ground and know more about the organization than most. Be honest and clear with your expectations, be supportive and most of all appreciative. They would do anything for you and want you to be as successful as possible. As they have your back, you too need to have theirs. A successful CAO/Executive Assistant relationship can make all the difference, so really get to know them both professionally and personally".

"The worst thing that one can do is keep the Executive Assistant out of the loop."

"Check in with them and make sure you are on the same track. Make sure their workload is not too large or too little. Be honest with each other."

"Don't decide last minute that you are taking a day off requiring a full calendar day to be rescheduled."

"Communicate – tell them what you need/want. They can't read your mind (yet). Act with a level of respect that you would expect to receive – they are a professional with professional experience just like you and have expectations on behaviour in a professional setting."

"Be completely transparent with expectations. Honesty goes a long way with any employee. Tasks need to be presented concisely and expectations clearly set in the beginning."

"Include them in important meetings so that they have the high-level knowledge of what is happening in the organization."

What is the Most Rewarding Aspect of Being Executive Assistant to the CAO?

The Executive Assistants told us that they find their profession to be extremely rewarding as they get to perform a variety of tasks while supporting the CAO in seeing the vision of the municipality and helping others solve their problems.

There is a strong sense of accomplishment when they see their many projects come to fruition through teamwork, which is most often very much appreciated. This in turn, makes the organization successful and they played a huge part in it behind the scenes.

"You are respected and held in confidence by all levels of the corporation, Council, stakeholders, and the community. You also get a "corporate wide" experience as you are constantly dealing with each and every aspect of the corporation (i.e. finance, infrastructure, strategic planning, legislation, planning, etc.)"

"That I can make a difference in the community by how I support the CAO. I like that I know many different things about what is going on in the community and within our organization. I can help share a different perspective with the CAO at times."

"Doing the behind the scenes work and then seeing great pay off when big moves are made."

"Making the impossible, possible. Facing the daily unknowns and being able to navigate well through them solving problems. Constantly learning. Helping others be effective."

"The most rewarding part is seeing the difference we make in our CAO's day, being there for them through the good and the bad and helping where we can."

"I have had a great career working with some great CAO's who have mentored me and that I totally respect, and they respect me. All advice makes you better."

"For me, the most rewarding aspect is that I have an amazing boss who I respect and who is invested in my success and progression within the organization."

"Seeing your CAO organized and ready to seize the day and being reflected in a positive light."

"Enjoy a lot of autonomy, and my boss lets me often run with the ideas I have pitched to him."

"That alongside your CAO you are facing the same challenges from a different lens. Sometimes the way we view situations and share with our CAO allows them to see a different perspective. It is rewarding when you are heard. The job allows you to learn every day, face the same challenges as our CAO and be effective in the job."

"Working with senior management to affect positive change within the organization and throughout our municipality."

"When major projects come to fruition and you can sit back and enjoy the moment as a team!"

"I like having the big picture of how our entire organization works."

"When you have made your boss shine and they are successful, be it at an event, or in a specific situation."

"Learning experience. I'm not sure that what I've learned in the Executive Assistant role could actually be taught anywhere."