



## HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

*Class Code: 1100-AS65  
FLSA Status: Non-Exempt*

### **Executive Assistant Bargaining Unit: Management**

#### **DEFINITION:**

Under minimal direction, an Executive Assistant performs a variety of administrative support functions related to overseeing the activities and operations of Santa Cruz METRO's Administrative Department; serves as recording secretary to the Board of Directors; communicates with governmental agencies, attorneys, community groups and others to exchange information, schedule meetings and coordinate activities; acts as a liaison between the CEO/GM and the Board, other employees, and outside agencies; acts as a representative for Santa Cruz METRO at various internal and public functions; supervises, assigns, monitors and evaluates the work of the departmental clerical staff; and performs related work as required.

#### **DISTINGUISHING CHARACTERISTICS:**

The Executive Assistant is distinguished from other administrative support classes by the higher degree of confidentiality, independent judgment required; a thorough knowledge of governmental, department, and public meeting/Boards procedures and policies; and the ability to choose among a number of alternatives in performing a variety of complex assignments without instruction and in scheduling and completing work. Incumbents routinely handle highly confidential and sensitive information; may serve as staff support on internal and external committees, may have budget preparation and administration responsibility; and may represent the organization as required.

Incumbents in this class are distinguished from other administrative support by the primary responsibility of administrative support to the CEO/General Manager and Board of Directors. Work involves the highest degree of confidentiality, independent judgment and knowledge of organizational-wide, governmental policies and procedures.

#### **EXAMPLES OF DUTIES AND RESPONSIBILITIES:**

*The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.*

##### CEO/GM Administrative Assistance

- Functions as an executive administrator to the CEO/General Manager relieving him/her of administrative details.
- Maintains appointment calendar for the CEO/General Manager and members of the Senior Leadership Team (SLT), ensuring timeliness and responsiveness of matters requiring CEO/General Manager approval.
- Composes public and confidential business correspondence on behalf of the CEO/General Manager from minimal information or written drafts.
- Creates Power Point presentations on behalf of the CEO/General Manager and other members of the Senior Leadership Team.
- Ensures activities of the CEO/General Manager adhere to agency policies, procedures, and proper protocol. Implements programs, policies, systems and procedures in



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accordance with financial and operating plans.

- Represents the CEO/General Manager at various meetings as assigned with sensitivity to a politically socio-economic and culturally diverse community.
- Establishes and assists in maintaining contact and communications with individuals, groups and associations within the agency and the community.
- Administers agency's AB1234 Ethics Certificates, conflict of interest code and acts as agency's filing officer for Form 700 relating to submittals by agency employees and Board members/alternates to ensure compliance with the State Fair Political Practices Commission Requirements
- Ensures compliance with Brown Act
- Public records management and document control

### Board of Director Assistance/Liaison

- Maintains meeting/appointment calendar for the Board of Directors and the Committees
- Takes minutes at regular and special Board meetings, Standing Committee and (as appropriate) Ad Hoc Committees, takes and transcribes notes from oral presentations, meetings and machine dictation.
- Prepares the monthly Board and committee meeting agendas in accordance with the CEO/General Manager and General Counsel's item review and selection.
- Oversees the administrative support of the METRO Advisory Committee (MAC)
- Coordinates the preparation and delivery of board packets
- Coordinates all aspects of the Board, agenda and Board reports process.
- Coordinates public and private business correspondence in support of the Board of Directors
- Creates Power Point presentations in support of the Board of Directors
- Monitors Board actions including the coordination for executing contracts, publishing resolutions and ordinances, advising management and staff of Board actions and carrying out legally required procedures, to ensure timely and appropriate responses.
- Coordinates and participates in the orientation of newly appointed city/county representatives to the Board and its committees as it relates to Board Operations and requirements
- Ensures Board members are properly reimbursed for participation in METRO-related meetings via the monthly compensation process
- Ensures METRO's website is updated with Board information.

### Office Administration

- Schedules appointments and meetings and assists in the design of presentations for meetings.
- Proof reads and edits outgoing business correspondence.
- Supervises, trains, assigns and monitors the work of the departmental clerical staff and evaluates performance.
- Establishes procedures for departmental clerical staff including incoming and outgoing mail, screening calls and maintaining files and records.



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- Coordinates and staffs various Santa Cruz METRO team meetings.
- Develops, maintains, and updates complex manual and automated recordkeeping systems.
- Prepares estimates of office supplies and equipment and assists in the preparation of the preliminary budgets for Administration, Safety and Legal Departments.
- Monitors the Administrative departmental budget.
- Assists in researching and recommending office equipment.
- Operates a variety of office and business machines including computer equipment.

### Special Projects

- Independently researches and prepares reports and confidential documents and correspondence.
- Responsible for the coordination of research projects, data collection, and the development of reports on behalf of the CEO/General Manager, Board and agency.
- Coordinates all employee and Board business travel arrangements for Santa Cruz METRO.
- Distributes and advertises for legal notices and other legal advertising.
- Coordinates and executes special projects and assignments.
- Performs other duties as assigned.

### EMPLOYMENT STANDARDS:

#### Knowledge of:

- Office procedures and practices including filing and preparation of business correspondence, forms and reports.
- Proper business English usage, spelling, grammar and punctuation.
- Principles and practices of supervision and training.
- In-depth knowledge of Microsoft Office Suite and other standard office software systems.

#### Ability to:

- Typing at a corrected rate of 55 words per minute.
- Operating standard audio visual and office equipment, including electronic typewriter, computer, photocopiers, calculator and transcribing machine
- Develop and administer office procedures and practices
- Exercise extreme discretion when working with confidential and/or sensitive material and topics.
- Maintain composure in stressful situations, communicating with the public, Board members and staff in a calm, respectful manner.
- Prepare business correspondence, forms, and reports.
- Compose clear, concise reports and correspondence using proper formatting, English grammar, punctuation and spelling.
- Effectively communicate both orally and in writing.
- Develop and use effective methods for filing and retrieving documents.
- Take minutes and record discussion and actions at meetings and public hearings.



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- Perform varied, difficult secretarial work requiring accuracy and speed.
- Establish and maintain effective working relationships with the public, Santa Cruz METRO employees, Santa Cruz METRO Board members and others.
- Work independently in the absence of specific instructions.
- Research, locate, compile and summarize data.
- Coordinate complex, administrative, and legally required functions with District Counsel.

### **MINIMUM QUALIFICATIONS:**

#### **Education, Training and Experience:**

Any combination of training and experience equivalent to five (5) years' responsible executive reporting level administrative experience. A four-year undergraduate degree preferred.

#### **AND**

Two (2) years of experience supervising administrative/clerical personnel.

Knowledge of basic office equipment and personal computers. Familiarity with software programs such as Microsoft Office Suite, to include Word, Excel, Access, PowerPoint etc. A working knowledge of software such as Adobe Acrobat, SmartSheet, Visio, and web-based publication software is beneficial.

#### **LICENSES AND CERTIFICATES:**

A valid Class C driver license and safe driving record is required at the time of application. A valid Class C State driver license is required at the time of appointment and must be maintained throughout employment.

#### **SPECIAL REQUIREMENTS:**

- Must be able to work extended hours as needed, often outside regular business hours as required by the CEO and the demands of the job.
- Must maintain strictest confidentiality.
- Must participate in professional development activities.

#### **PHYSICAL AND MENTAL DEMANDS:**

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### **Physical Demands**

While performing the duties of this job, the employee is regularly required to sit, walk and stand; talk and hear; use hands to finger, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional standing, walking, overhead reaching and lifting up to 10 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.



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### **Mental Demands**

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work, including frequent contact with customers and/or the public and dissatisfied/abusive individuals.

### **Work Environment:**

The employee works in an office environment where the noise level is usually quiet. May require availability to work a flexible schedule.

### **OTHER CONDITIONS OF EMPLOYMENT:**

Must pass requisite background check.

- \*Adopted: November 2017
- \*BOD Approved: 01-26-18
- \*Revised: 00-00-00
- \*Job Family: Professional - Administration