

**Executive Assistant**  
**Essential Task Ratings Results**

Task #	Task Statement
1	Maintain the Director's work schedule by entering appointments, reminders, travel information, and reminders into the system database (e.g., calendaring software) to ensure calendar accuracy and keep the Director apprised of meetings.
2	Schedule meetings involving department staff, management, stakeholders, and other parties by identifying mutually convenient times, attaching pertinent information, and giving notice using email and calendaring software.
3	Reserve hearing/conference rooms for various appointments and meetings including room set up (e.g., audio visuals, computer, and projector screens).
4	Develop detailed itineraries using word processing or other software listing travel times, meeting schedules, and pertinent contact information for the Director's reference.
5	Collaborate with interdepartmental staff to fulfill requests on behalf of the department within timelines.
6	Compile meeting materials using word processing or other software, program input, and work or strategic plans for dissemination prior to meetings.
7	Facilitate follow-up to matters by meeting with parties to resolve problems that may prevent timely movement of materials.
8	Develop meeting materials using the Director's input, program input, and work or strategic plans for dissemination prior to meetings.
9	Participate in various meetings to provide support staff perspectives and collaboration.
10	Prepare envelopes/packages for mailing including confidential materials (e.g., copying, addressing, sorting, stuffing, and assembling) utilizing copiers and sorting techniques/equipment.
11	Distribute incoming mail, including personal and confidential materials, using letter openers, date/time stamp protocols, and sorters to ensure delivery to appropriate staff.
12	Act as liaison between department and Agency to ensure a point of contact and coordinate communication on behalf of the department.
13	Create and maintain a suspense and /or tickler system for Executive action or followup (e.g., document agenda)

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14	File materials (e.g., documents, policies, personnel, unit, program, project directories) using various filing systems (e.g., alphabetic, chronological, numeric) to organize and maintain documents for future reference utilizing binders, folders, indexes, alpha/numeric sorter, office procedures, and electronic databases and other software.
15	Input assigned correspondence into tracking software in order to maintain a record of assignments.
16	Organize and update office files by creating, labeling, and filing documents using various organization methods (i.e. alphabetical, semantic, numerical).
17	Maintain accurate meeting notes to ensure that documents listed for the Director's meetings are current with corrections and revisions.
18	Input documents into tracking software to maintain workload log.
19	Review, revise, and proofread documents and written materials (e.g., reports, meeting materials, agendas) to ensure accuracy and completeness.
20	Distribute timesheets to staff, obtain appropriate signatures, and forward to appropriate personnel for processing.
21	Prepare, review, and proofread correspondence (e.g., memos, letters, emails) for signatures to communicate with various departments or agencies on the Director's behalf.
22	Prepare documents and/or records prior to mailing on behalf of the Director to various constituency groups or other interested parties.
23	Analyze correspondence (e.g., email, memos, letters, invitations) and prepare the response or direct and/or assign the correspondence to appropriate level staff for response.
24	Take notes at meetings to assist in maintaining accurate records.
25	Screen telephone calls to elicit information regarding nature of the inquiry, and determine and/or assign to appropriate staff.
26	Respond to inquiries via telephone or in person to provide information or guidance on procedures and services.
27	Respond to invitations, inquiries, and/or requests for information on behalf of the Director.

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28	Respond to requests for information by collecting and researching necessary information/data from staff and other sources.
29	Respond to and/or assign inquiries from legislative offices, other government agencies, and the general public in accordance with established policies and guidelines.
30	Gather and analyze travel costs by contacting various businesses (e.g., hotels, airlines) in order to determine total costs of travel arrangements and ensure compliance with travel policies using spreadsheet, calendaring, and other software.
31	Analyze and evaluate problems or issues regarding the progress and completion of work projects or assignments to determine impact, assess alternatives for resolution, and/or formulate action plans.
32	Secure travel accommodations (e.g., hotel reservations, airline reservations, car rentals) to ensure the Executive's arrangements are in place in a timely manner following current travel policies and procedures.
33	Prepare and route travel forms (e.g., travel advance, travel excess lodging, out of state travel) to appropriate personnel to ensure the Director and/or staff receives approval.
34	Prepare and process travel reimbursement expense claims (e.g., meal expenses, hotel, travel arrangements) following travel policies and procedures using appropriate software (e.g., CalATERS).
35	Research and gather data from various resources (e.g., websites, company profiles, personal profiles) prior to meetings, conferences, and special events when requested by the Director.
36	Complete special assignments (e.g., request from Governor's Office, request from elected official's office) in collaboration with staff under the direction of the Director.
37	Research background information on meetings and speaking engagements requiring the involvement of the Director.
38	Collaborate with various sponsors, presenters, and attendees to coordinate events (e.g., nature of event, location, number of people, agenda).
39	Research and gather data from staff and others in order to provide organized information to the Director and/or other advising staff.
40	Delegate responsibilities (e.g., copying, faxing) to appropriate clerical staff members to ensure work assignments are completed.

<b>Task #</b>	<b>Task Statement</b>
41	Track and monitor the progress of other staff to ensure the quality and timeliness of work assignments under the guidance and direction of the Director.
42	Train staff on work procedures to ensure office consistency.