#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Executive Assistant to the Vice President, Finance & Administration

**Job Number:** X-227 | VIP: 1131

**Band:** EXEMPT- 5

**NOC:** 1222

**Department:** Office of the Vice President, Finance & Administration

**Supervisor Title:** Vice President, Finance & Administration

**Last Reviewed:**  May 5, 2021

#### **Job Purpose:**

Reporting to the Vice President, Finance and Administration, works closely with Associate Vice Presidents and Directors in the Finance and Administration portfolio, as well as the reporting staff in the PVP offices and the Secretariat. Provides complex administrative support to the Vice President, Finance and Administration in a broad range of corporate activities including managing the VP office and communication, planning and monitoring project plans and timelines, financial monitoring of VP Finance and Administration budgets, and special projects in order to make the most efficient use of the VP’s time. Coordinates and supports several Administrative Advisory Committees, Management Committees and Project Steering Committees. Acts as liaison between the VP’s office and the Secretariat ensuring Board of Governor and its subcommittee reports (Finance & Property, Audit and Investment & Pension) are completed and sent in on time. Coordinates projects/meetings as required e.g. staff budget meetings, committee member elections, special events, building tours, contests, etc.)

**Objectives:**

* Maintain communication with direct reports and the Secretariat office to update VP on status of projects; and to answer inquiries when required
* Develop, implement and maintain project reporting tools and timelines
* Attend internal/external meetings, as required, by the VP, to both document, follow up and action items.
* Brief the VP on urgent and confidential items, issues that arise at committees, concerns from reports and situations that may arise within the University
* Supporting the VP in daily University operations and situations that are frequently confidential, conflicting and/or sensitive in nature
* Oversee operational accounts for the VP Office, the Endowment Lands accounts, as well as general University expenditures
* Supervise student reception role(s): administer and follow-up on tasks, oversee tasks provided by other VPs, schedule and sign off on payroll, apply for student work grant and provide subsequent reports to Careers.
* Actively pursue strategic and operational objectives (ie. Research of University policies, rules and regulations for the purpose of project correspondence or application response; maintain relationships with internal and external partners to add value to current and future projects.
* Coordination of Riverside Hallway communications; meeting space; facility needs;
* Support the needs of the other VP(s) whenever there are multiple portfolios engaged.

#### Key Activities:

##### Scheduling and Meeting Management

* Organize and manage the day-to-day activities of the VP to ensure efficient and effective office operations. Coordinates and schedules all of the VP’s meetings. Coordinates with the PVP offices, the Secretariat and other departments regarding the organizing and running of meetings, organizes travel arrangements, maintains filing systems, tracks time-sensitive documents and performs complex duties to assist the VP as required.
* Manages all communication for the VP including correspondence, reports, presentations and emails.
* Monitors follow-up with all distributions that require answers, responses and written replies, and ensures the VP has complete information upon which to base decisions.
* Provides information, advice and analysis regarding correspondence, special events, daily schedules and university communications.
* Composes letters, memos, emails and website content for internal faculty, staff, students, and external partners, associations, government agencies and the general public.
* Works closely with VP direct reports and the VP ER&A to write, edit and complete reports as required by the Board or its Committees (Finance & Property, Aduit & Investment, Trent Lands
* Conducts independent research, as required, involving interpretation and application of University policies, rules and regulations to aid in composition of correspondence.
* Coordinates and provides administrative support, including creating agendas, background materials for meetings and taking meeting minutes for several VP Management, Advisory and Project Steering Committees.
* Tracks and sends out reminders of action items required to be completed by committee members and the VP.
* Conducts research, develops forms, writes memos and drafts reports and communiqués as required for the VP Committees.
* Represents the VP in Committee meetings as required.
* Acts as Secretary to several Committees including Extended Management Committee, Space & Construction Management Committee, Finance and Administration Department Heads Group, Facilities and Grounds Advisory Committee, Nature Areas Stewardship Advisory Committee, Operations Management Committee, and other Construction and Project Committees as required.
* Liaises with external identities such as the MTCU, COU/CSAO, CURIE, CAUBO, City of Peterborough, City of Oshawa, other post-secondary institutions, contractors, consultants, lawyers, tenants, bank and investment companies, etc. regarding coordination of meetings, reporting requirements and requests.
* Oversee the scheduling and activities of the Riverside Student Receptionist(s)
* Handles general enquiries and complaints, including referral to the appropriate portfolio for action and follow up.

**Financial Oversight**

* Working knowledge and understanding of Endowment Funds, ancillary budgets and operating budgets.
* Fiscal management and budget management within the VP’s portfolio
* Responsible for compilation and presentation to VP of portfolio-wide quarterly roll-ups
* Create succinct roll-up of operational budget variations by AVP/Department, including variant analysis as received from AVP/Directors
* Responsible for the management of the VP budgets and tracking expenditures of several financial accounts including University General ($1.6mil budget), VP Admin office ($20k non-staff expenses), VP Contingency ($25k) , and the Equipment Replacement Fund ($84k), as well as the Endowment Lands accounts ($4.2 mil) to ensure responsible financial management.
* Completes purchase requisitions for purchases and payment of invoices on all accounts.
* Reconciles the VP F&A and VP F&A Office VISA statements monthly, ensuring all expense documentation, approvals, budget allocations, and online submission are done in a timely fashion.
* Acts as purchasing agent for the VP F&A Office and Riverside Hallway for all equipment, furniture & supplies, which includes liaison with suppliers, acquiring prices, processing orders or supervision of same and maintaining records and ensuring payment.
* Discovers and investigates inaccuracies within the accounts and take appropriate measures for reconciliation.
* Provides administrative support to the VP for the annual and quarterly work planning, budgeting and financial monitoring processes.
* Makes recommendations for required budget reductions based off of a total reduction goal.
* Assists with the preparation of funding proposals to (MTCU) as required including acquiring information from several sources and editing large reports to ensure accuracy and consistent content.

**Project Coordination**

* Monitors the submission of various university reports and project plans, ensuring the required information is provided and submitted on time, by offering assistance, interpretation and clarification on reporting requirements where needed, in order to ensure compliance with government and/or university requirements and timelines. (i.e. Government/MTCU proposals and reports such as long-term Capital Planning and the annual Public Sector Salary Disclosure as well as monthly reports to the Board of Governors and its Committees (Finance and Property Committee, Audit Committee, Investment and Pension Committee, Pension Sub-Committees).
* Provide project coordination for VP projects including administrative support (group correspondence, historical backgrounds, etc.), meeting scheduling, agendas
* Work with legal and consultants (financial and facilities) to coordinate and consolidate internal feedback on RFP’s
* Plans, manages and initiates special projects on behalf of the Vice President. Performs high priority and confidential duties as necessary (i.e. drafting PVP Sub-Committee memos, research for reorganization proposals, tracking staff human rights complaint documents, etc.).
* Organizes and completes logistics for all-staff budget meetings, President’s Open Forums and other internal or external meetings or events (construction project open house, focus sessions, etc.) as required.

**Riverside Hallway Operations**

* Assist whenever necessary with the booking of space within the Riverside Hallway
* Work with facilities, IT and shipping & receiving to ensure the needs of the hallway are met by scheduling and requesting regular maintenance
* Project coordination for any communal space
* Sit on Bata Library Staff committee
* Assist other VPs as necessary
* Secretary to MCPC committee
* Coordinate Executive Assistants meetings (professional development, communications, job review)

#### Education Required:

* Honours Bachelor’s Degree (4 years) in a business-related field

#### Experience/Qualifications Required:

* A minimum of 5 years demonstrated experience in an executive secretarial role, preferably supporting a Senior Administrator.
* Experience in the development and management of large budgets, including familiarity with general accounting and budget systems.
* Detail-oriented, well-organized, focused and goal-oriented, with both initiative and energy.
* Superior computer skills with MS Office (Word, Excel, Access), electronic calendar, internet research, file management systems.
* Ability to organize and prioritize tasks using initiative, sound judgment with a high level of professionalism.
* Experience in managing the administrative tasks for capital projects, and the ability to work within tight timelines.
* Experienced in handling sensitive and confidential situations and issues.
* Familiarity with legal documents.
* Demonstrated ability to interact comfortably, tactfully, and effectively with internal and external constituencies.
* Adept at problem solving and excellent judgment in situations requiring initiative and tact.
* Excellent interpersonal, verbal and written communication skills.
* Demonstrated ability to work independently.
* Demonstrated skills in, and commitment to, customer service and continuous improvement.

#### Supervision:

* Supervise and direct the activities of student employees
* Student Employee(s) in the Riverside Hallway: Nature of supervision: hiring/dismissal, schedule, assign work, monitor progress, evaluate, supervise, train, discipline, provide guidance and instruction, motivate, mentor.

**Job Evaluation Factors:**

**Analytical Reasoning**

1. Must adapt methods to resolve problems in a fast paced environment with continually changing priorities. Responsible to ensure that all reporting guidelines are met; encouraging the staff responsible (usually an Associate Vice President or Director) to complete the reports and submit them on time. Need to multi-task and prioritize own work in an environment that has diverse components and competing priorities due to the scope of the VP’s portfolio as well as tight timelines in an office where there are no other administrative staff.

Examples:

* There is over $180,000 in a university account for equipment renewal. Requests to spend that money need to be reviewed. A reconciliation of Purchase Orders to requests needs to be conducted to verify how the funds were spent and to determine if each purchase qualifies to be transferred from the account. Request the appropriate transfers from Finance. Advise the VP of the amount left in the fund, pending items and new funding requests.
* Tracking University General and VP Admin budgets, reconciling and investigating anomalies and errors. Using Datatel/web advisor/paper files or contacts in Finance, to look up needed information. Question appropriate staff with regards to any findings, then either recover the appropriate documentation or ask Finance for a correction if warranted.
* Represent the VP in the Nature Areas Stewardship Advisory Committee meetings, providing accurate historical input and advice to members who are almost all new each academic year. Present information while also being aware of political and historically sensitive issues between the committee and university Finance and Administration.
* Conduct independent research on issues, write memos, university and public communiqués and interpret contracts/MOUs.

**Decision Making**

1. Daily priority setting, weekly/monthly workflow schedules, correspondence, and committee coordination work are completed independently. VP calendar scheduling and office management duties including purchasing, accounts payable and bookkeeping are completed independently.
2. Anticipating the VP’s workload through monitoring and reviewing incoming email, correspondence, meeting requests and training to provide background materials in advance of meetings.
3. Decide which issues need to go to the VP for consultation, advice, and which can be handled without the VP and by whom.
4. Initiate new ideas to make minor improvements to VP office procedures.

**Impact**

1. Not keeping the VP informed of relevant issues can lead to major problems, miscommunication and erosion of trust in this office by other departments. Adversely, by inundating the VP with too much information, this can impair his ability to deal with the priorities of the office and of the university properly.
2. Responsible for tracking of timelines/deadlines for items such as Government funding proposals, Board of Governor Reports, human rights complaints, committee action items, VP Admin priorities, the Post-Secondary Salary Disclosure, and other sensitive documents etc. Undetected errors can have a wide range of negative effects to the VP office and the university from seeming incompetent, to loss of valuable time for project advancement/approval, to being incompliant to the MTCU, or loss of potential funding for the university.

**Communication**

Internal:

* Associate Vice Presidents and Directors who report directly to the VP Finance and Administration - AVP of Finance, AVP of Facilities Management, Director of Risk Management, AVP, IT, AVP, Students, Director of Athletics & Recreation: Work closely with them to inform them of the VP’s requirements, discuss issues/problems, presentations and reports and reminders of actions required by them.
* Vice President’s indirect reports, e.g. Budget Manager, Purchasing Manager, Capital Project Managers, IT Managers, etc.: Inform them of the VP’s requirements, issues, problems, and actions/reports required by them.
* VP’s Advisory Committee’s members (composed of AVP’s, Faculty, Directors. Managers, staff, and students) such as Facilities & Grounds and Nature Areas Committees: Coordinate meetings, draft agendas, compose emails, memos, reports, forms, university-wide communiqués, take meeting minutes, write and post content on the website, prepare and conduct committee new member orientation, report verbally to them in meetings, remind members of action items. Provide historical advice as to what the committee had agreed to in the past and on related Board of Governors historical documents (i.e., Board approved university zones and use of property)
* VP’s Management and Project Steering Committees (composed of VP’s, AVP’s, Faculty, Directors, and Managers) such as members of the Space & Construction Management Committee, IWP Project Steering Committee, Extended Management, etc.: Coordinate meetings, draft agendas, take meeting minutes, write memos to upper level management/Dept Chairs/all staff, and send reminders of action items to committee members.
* Staff in the Secretariat, the President’s/other VP’s offices and departments: Exchange of information, coordinate meetings.
* TCSA Executive – coordinate meetings as requested.

External:

* MTCU – sending reports based on their requirements including the PSSD, Capital Planning, compensation restraint, etc.
* COU– exchange of information.
* CSAO (sub of COU) coordinate meeting schedules, exchange of information.
* CURRIE/CAUBO and other Associations – coordinate meeting schedules, exchange information and reports.
* City of Peterborough-coordinate meetings
* City of Oshawa – coordinate meetings
* Developers, contractors, lawyers, consultants who have dealings with the university, usually to coordinate meetings, exchange of documents, reports, processing of fees.

**Motor/ Sensory Skills**

* Typing – typing of minutes, reports, letters, emails, etc.
* Writing by hand – taking minutes during meetings, etc.

**Effort**

Mental:

* Sustained concentration: Taking meeting minutes - sitting in one spot for at least an hour at a time listening and recording, which requires a high degree of focus and sustained concentration. There is a great need of comprehension for the items being discussed and the ability to instantly filter out irrelevant and sensitive information.

Physical:

* Sitting for extended periods of time during meetings or while at the computer and typing.

**Working Conditions**

Physical:

* Sitting at a computer, typing for long periods of time on a daily basis.
* Hand writing for more than an hour at a time while taking meeting minutes.

Psychological:

* Interruptions – there are interruptions constantly and the need to refocus on priorities continually.
* Dealing with complaints/frustrations of other staff, especially due to budgetary constraints or staffing issues.