



Productivity Plus Profile™

Administrative Management Jobs

Case Study One
October, 1999 — August, 2000

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Saratoga, California

1999-2000 VTEA Grant
Carl D. Perkins Vocational and Applied Technology Education Act of 1998

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Introduction

Three years ago, in an effort to clarify the role of office professionals and to identify educational and career development opportunities in this field, the West Valley College Office Administration Advisory Board established a task force. In January 1999, the board elected to seek project funding to begin Developing Performance Standards and Measures for Office Professionals. In 1999, funding through a West Valley College VTEA grant was awarded for Phase One of this project, Defining the Administrative Assistant Position.

It is important to note that during the course of the study, the term “Administrative Assistant” evolved into a cluster of Administrative Management Jobs that included interchangeable titles of Administrative Assistant, Executive Assistant, Office Manager and Administrative Manager. In the end, all four job titles were combined and included in Phase One of this project. Complete results of the study can be found at www.officeprofessionals.org.

THE PROFILE is a tool that was developed to share and implement some of the processes and results used in the study.

THIS PROFILE IS A BLUEPRINT FOR YOUR JOB THAT INCLUDES

- Changing how your job is perceived
- Defining how you contribute toward organizational objectives
- Evaluating the expertise you're utilizing
- Updating your compensatory guidelines
- Developing new performance management strategies

BARBARA LEA and I were honored to be selected by the board to manage this complex project. Barbara has been teaching business and computer application courses at West Valley College since 1964 and can take credit for developing many of the college's more innovative office training programs. I have been designing and implementing performance improvement processes since 1980 and began my own firm, Productivity Plus Processes, in 1990. Over the years, I have worked with thousands of office professionals and their managers, helping them redefine their changing roles.

Special Acknowledgements

to the West Valley College Office Administration Advisory Board for their guidance; to the Subject Matter Experts and their managers for their fortitude and suggestions; to Pam Luster at West Valley College for her generosity; to Sydney Whaley for rescuing our database; to JK Hudson for her artistry; to my husband, Carl Gadener, for his technical assistance; and to my daughter, Blossom Lefcourt, for her editing support. However, this project would never have become a reality without the initial seeds planted long ago by Nancy Freeze, a former professional secretary and founding member of the Office Administration Advisory Board.

Melanie Gadener
Project Coordinator
Fremont, California
September, 2000

Defining Administrative Management Jobs

Part of the problem is defining what office professionals are.

Each company defines the typical titles in different ways. In one office, an administrative assistant may do entry-level work; while in another company, he or she may be the one managing the office. In fact, the office professional field has come to represent a wide range of occupations centered in clusters of general office jobs, specialized office jobs, and administrative management jobs.

GENERAL OFFICE JOBS: Data Entry Operator, Word Processor, Office Assistant, Receptionist, and Secretary

SPECIALIZED OFFICE JOBS: Accounting Assistant, Customer Service Representative, Desktop Publisher, Human Resources Specialist, Marketing Assistant, Meetings and Event Planner

ADMINISTRATIVE MANAGEMENT JOBS: Administrative Assistant, Executive Assistant, Office Manager, and Administrative Manager.

The Subject Matter Experts

who participated in the case studies were executive-level administrators with a range of 10-28 years experience. They reported to senior managers and supervised their own support staff. Two held Certified Professional Secretary (CPS) degrees. They all had different job titles and job descriptions: Administrative Support Assistant; Executive Assistant; and Office Manager. They did similar work, had comparable levels of responsibility, and made equal contributions to their organizations.

A New Definition

During the course of the study, the term “Administrative Assistant” evolved into a cluster of Administrative Management Jobs. The cluster includes interchangeable titles of Administrative Assistant, Executive Assistant, Office Manager and Administrative Manager. In the end, all four job titles were combined and included in Phase One. As a result, the West Valley College Office Administration Advisory Board elected to adopt a standard description that would define this cluster of interchangeable job titles.

The adopted description was developed as part of a 1999 Santa Clara County labor market information study. Research for the study was sponsored by NOVA Private Industry Council, California EDD, and California Occupational Information Coordinating Committee (COICC). Details of the study can be found at www.calmis.ca.gov. Although the Occupational Employment Survey (OES) description uses the job title “Administrative Assistant”, it represents work done by most senior level office professionals including administrative assistants, office managers, executive assistants and administrative managers.

1999 Non-Occupational Employment Statistics (OES) Code: 169167997

Administrative Assistants, (office managers, executive assistants, and administrative managers¹) aid executives by coordinating, analyzing, and improving office services, such as personnel, budget, and operative practices. They analyze personnel requirements, study methods of improving performance standards, and analyze jobs for wage-and-salary adjustments and promotions. They analyze budgetary requirements and expenditures and study methods to implement cost reduction. They analyze operating practices and create new systems or revise established procedures to simplify and improve reporting procedures, workflow, record keeping systems, forms control, office layout, or suggestion systems. They interpret operating policies, prepare reports with recommendations for solutions of administrative problems, and answer correspondence. They may direct services, such as maintenance, repair, supplies, and mail.

¹ Not part of the OES description

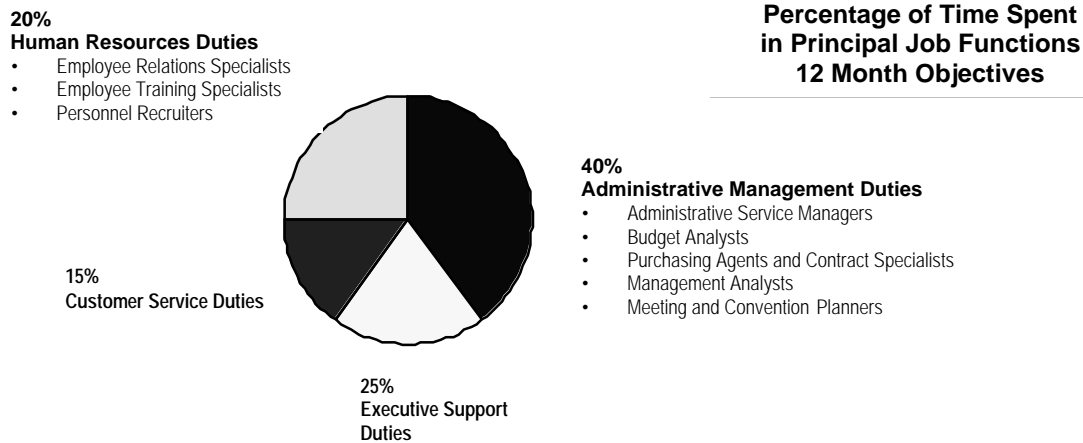
Subject Matter Expert (SME) Title: Executive Assistant

Years of experience: 28

Years with current company: 10

Summary

The Subject Matter Expert (SME) and her manager identified a combined total of 33 major tasks that were associated with the SME's current job. Further discussion was needed regarding 12 of those tasks. The SME detected 10 tasks that the manager was not acquainted with and the manager recognized 2 tasks that the employee had not perceived herself doing. After further explanation, a consensus was reached that all 12 tasks in question were in fact part of the SME's job. The SME and manager agreed that the SME's work and contributions were divided as shown in the chart below. It is interesting to note that **this SME will spend just 25% of her time over the next year doing Executive Support work.**



Performance Development Focus Selected for This Review Period:

- Plan, direct and coordinate customer service activities within an organization.
- Perform a variety of duties to promote employee welfare, such as resolving human relations problems and promoting employee health and well-being.

Aid executive by coordinating office services, such as personnel, budget preparation and control, housekeeping, records control.

Compensation Recommendations

- **\$ 55,640** Annual base salary² recommendation for average performance, based on 50th percentile median weighted wages³
- **\$ 75,483** Annual base salary recommendation for exemplary performance, based on 75th percentile median weighted wages

² Does not include overtime, bonuses, stock, stock options, etc.

³ Refer to Composite Base Salary Worksheet

Principal Job Responsibilities — 12 Month Objectives

Composite overview of essential job responsibilities for Administrative Management positions

Administrative Management Functions

- Compile and analyze statistical data to determine feasibility of buying products and to establish price objectives for contract transactions.
- Coordinate activities of staff and convention personnel to make arrangements for group meetings and conventions.
- Examine budget estimates for completeness, accuracy, and conformance with procedures and regulations. Examine requests for budget revisions, recommend approval or denial, and draft correspondence. Analyze budgeting and accounting reports to maintain expenditure controls. Provide technical assistance in the preparation of budgets.
- Plan, direct, and coordinate services of an organization, such as recordkeeping, mail distribution, telephone reception, and other office support services that may include facilities planning, maintenance, and custodial operations.
- Review, analyze and suggest improvements to business and organizational systems to assist management in operating more efficiently and effectively. Conduct organizational studies and evaluations, design systems and procedures, conduct work simplification and measurement studies, and prepare operations and procedures manuals.

Customer Service Functions

- Plan, direct and coordinate customer service activities within an organization.

Human Resource Functions

- Coordinate and conduct employee training programs to train new and existing employees how to perform required work, improve work methods, or comply with policies, procedures, or regulations
- Perform a variety of duties to promote employee welfare, such as resolving human relations problems and promoting employee health and well-being.
- Seek out, interview, and screen applicants to fill existing and future job openings and to promote career opportunities within an organization.

Executive Support Functions

- Aid executive by coordinating office services, such as personnel, budget preparation and control, housekeeping, records control.

JOB ACTIVITIES

General types of job behaviors occurring on multiple jobs

Mental Processes

Processing, planning, problem-solving, decision-making, and innovating

- Analyze data or information
 - Judge qualities of things, services, people.
 - Make decisions and solve problems
 - Schedule work and activities
-

Interacting With Others

Interactions with other persons or supervisory activities

- Coach and develop others
 - Communicate with other workers
 - Communicate with persons outside the organization
 - Coordinate work and activities of others
 - Establish and maintain relationships
 - Monitor and control resources
 - Perform administrative tasks
 - Provide consultation and advice to others
 - Resolve conflict, negotiate with others
 - Staff organizational units
-

Information Input

Where and how information and data is gained

- Get information needed to do the job

General Task List — 12 Month Objectives

Individual Job Duties

Mental Processes

Processing, planning, problem-solving, decision-making, and innovating

- Analyze internal processes and plans or implement procedural and policy changes to improve operations.
- Analyze operating practices and procedures to create new or to revise existing methods.
- Coordinate activities of clerical and administrative personnel in establishment or organization.
- Coordinate and direct office services, such as records, budget preparation, personnel, and housekeeping, to aid executive.
- Develop and implement records management program for filing, protection, and retrieval of records, and assure compliance with program.
- Evaluate and select providers of services, such as meeting facilities, speakers, and transportation, according to customer requirements.
- Evaluate recruitment and selection criteria to ensure conformance to professional, statistical, and testing standards, and recommend revisions as needed.
- Organize and develop training procedure manuals and guides.
- Plan and adjust work schedules and assign duties to meet customer demands.
- Plan and develop programs, budgets, and services, such as lodging, catering, and entertainment, according to customer requirements.
- Recommend approval or disapproval of requests for funds.
- Recommend cost saving methods to improve efficiency of department
- Review forms and reports, and confer with management and users about format, distribution, and purpose, and to identify problems and improvements.
- Schedule classes based on availability of classrooms, equipment and instructors.

Interacting With Others

Interactions with other persons or supervisory activities

- Arrange for interviews and travel and lodging for selected applicants at company expense.
- Communicate with customers to ascertain needs, advise on services, adjust complaints, or negotiate contracts.
- Conduct reference and background checks on applicants.
- Confer with managers, instructors, or customer representatives of industrial or commercial establishment to determine training needs.
- Consult with customers to determine objectives and requirements for events, such as meetings, conferences, and conventions.
- Develop and conduct orientation and training for employees or customers of industrial or commercial establishment.
- Direct and coordinate activities of staff and convention personnel to make arrangements, prepare facilities, and provide services for events.
- Evaluate and resolve human relations, or work-related problems, and meet with management to determine appropriate action.
- Explain and provide advice to workers about company and government rules, regulations, procedures, and need for compliance.

Interview applicants to determine interests, qualifications, and employment eligibility plans and assist in developing employment and curriculum plans.

- Interview workers and discuss with personnel, human relations and other work-related problems that adversely affect morale, health and productivity.
- Locate and arrange for purchase of goods and services necessary for efficient operation of organization.
- Negotiate and administer contracts with suppliers and vendors.
- Observe worker performance and review employees' work to ensure accuracy or quality of work.
- Provide potential applicants with information regarding facilities, operations, benefits, and career or job opportunities in organization.

General Task List — continued

Information Input

Where and how information and data is gained

- File and retrieve corporation documents, records, and reports.
- Prepare records and reports, such as recommendations for solutions of administrative problems and annual reports.
- Prepare manuals and train workers in use of new forms, reports, procedures, equipment, according to organizational policy.
- Prepare and review operational reports and schedules to ensure accuracy and efficiency.

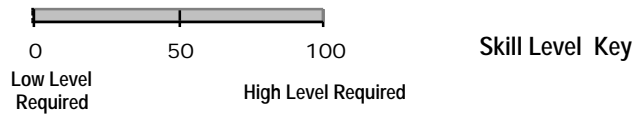
Professional Values and Ethics

Elements that will facilitate high performance

| Work Values | Corresponding Needs |
|-------------------------------------|---|
| Autonomy | Being able to plan work with little supervision |
| Creativity | Being able to try out independent ideas |
| Responsibility | Environments that allow employees to work on their own and make decisions |
| Ability | Environments that are results oriented and allow employees to use their strongest abilities |
| Achievement | Getting a feeling of accomplishment |
| Utilization | Having a feeling of accomplishment Using individual abilities |
| Advancement | Being able to give directions and instructions to others |
| Authority | Being looked up to by others in the company and community |
| Recognition | Environments that offer advancement, potential for leadership, and are considered prestigious |
| Social Status | Having opportunities for advancement |
| Compensation | Being able to do work alone |
| Good Working Conditions | Being paid well in comparison with other workers |
| Independence | Having something different to do everyday |
| Security | Having steady employment |
| Variety | Job security and good working conditions |
| Co-Workers | Co-workers who are easy to get along with |
| Moral Values | Doing things for other people |
| Social Service | Never being pressured to go against a personal sense of right and wrong Providing service to others Working with co-workers in a friendly non-competitive environment |
| Company Policies | HR supervisors who back up their workers with management |
| Supervision; Human Relations | Supportive management that stands behind its employees |
| Supervision; Technical | Technical supervisors who train their workers well Workers who are treated fairly |

SKILLS REQUIRED

Developed capacities that will facilitate performance of activities

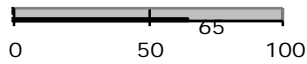


CONTENT SKILLS

Back ground structures needed to work with and acquire more specific skills in a variety of domains

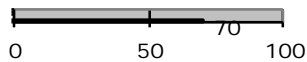
- **Active Listening**

Listen to what other people are saying and asking questions as appropriate



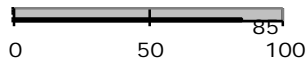
- **Speaking**

Talking to others to effectively convey information



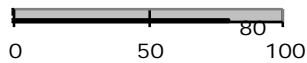
- **Reading Comprehension**

Understanding written sentences and paragraphs in work related documents



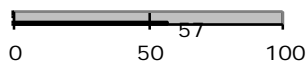
- **Writing**

Communicating effectively with others in writing as indicated by the needs of the audience



- **Mathematics**

Using mathematics to solve problems

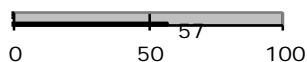


PROCESS SKILLS

Procedures that contribute to more rapid acquisition of knowledge and skills across a variety of domains

- **Learning Strategies**

Use multiple approaches when learning or teaching new things.



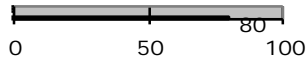
SKILLS REQUIRED - continued

SOCIAL SKILLS

Working with people to achieve goals

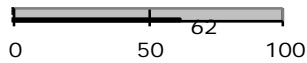
- **Coordination**

Adjust actions in relation to others' actions



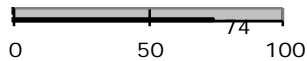
- **Persuasion**

Persuading others to approach things differently



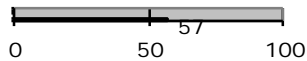
- **Social Perceptiveness**

Being aware of others' reactions and understanding why they react the way they do



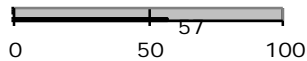
- **Negotiation**

Bringing others together to try to reconcile differences



- **Service Orientation**

Actively looking for ways to help people

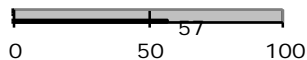


COMPLEX PROBLEM SOLVING SKILLS

Solving problems in real world settings

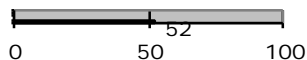
- **Information Gathering**

Know how to find information and identify essential information



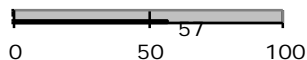
- **Implementation Planning**

Develop approaches for implementing an idea.



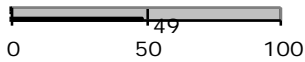
- **Idea Generation**

Generate a number of different approaches to problems

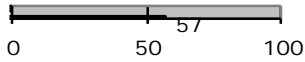


SKILLS REQUIRED - continued

- **Synthesis/Reorganization**
Reorganizing information to get a better approach to problems or tasks



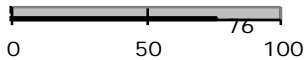
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- **Problem Identification**
Identifying the nature of problems



TECHNICAL SKILLS

Designing, setting-up, operating and correcting malfunctions involving machines and technological systems

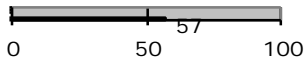
- **Computer Applications**
Using word processing, spreadsheet, database, desktop publishing, digital media, Internet research, and web content and design programs



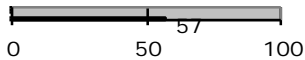
SYSTEMS SKILLS

Understanding, monitoring and improving organizations and systems

- **Judgment and Decision Making**
Weigh the relative costs and benefits of a potential action



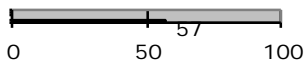
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- **Identification of Key Causes**
Identify things that must be changed to achieve a goal.



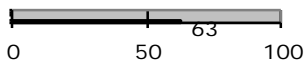
RESOURCE MANAGEMENT SKILLS

Allocating resources efficiently, including finances, materials, human resources, and time management

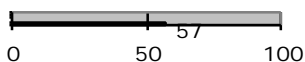
- **Management of Financial Resources**
Determine how money will be spent to get the work done, and accounting for these expenditures



-
- **Management of Personnel Resources**
Motivate, develop, and direct people as they work, identify the best people for the job



-
- **Time Management**
Managing one's own time and the time of others



ABILITIES REQUIRED

The most important enduring attributes of the individual that influence performance
Abilities that influence the acquisition and application of knowledge in problem solving

VERBAL ABILITIES

Abilities that influence the acquisition and application of verbal information in problem solving

- **Oral Comprehension**
The ability to listen and understand information and ideas presented through spoken words and sentences.
 - **Oral Expression**
The ability to communicate information and ideas in speaking so others will understand.
-

AUDITORY AND SPEECH ABILITIES

Abilities related to auditory and oral input

- **Speech Clarity**
The ability to speak clearly so that it is understandable to a listener.
-

QUANTITATIVE ABILITIES

Abilities that influence the solution of problems involving mathematical relationships.

- **Number Facility**
The ability to add, subtract, multiply, or divide quickly and correctly.
 - **Mathematical Reasoning**
The ability to understand and organize a problem and then to select a mathematical method or formula to solve the problem.
-

WRITTEN ABILITIES

Abilities that influence the acquisition and application of written information in problem solving.

- **Written Comprehension**
The ability to read and understand information and ideas presented in writing.
- **Written Expression**
The ability to communicate information and ideas in writing so others will understand.

Continuing Education Recommendations

| Bodies of Knowledge | Instructional Programs |
|--|---|
| <p>Administration and Management Knowledge of principles and processes involved in business and organizational planning, coordination, and execution. This includes strategic planning, resource allocation, manpower modeling, leadership techniques, and production methods.</p> | <p>Business Administration and Management Instructional programs that generally prepare individuals to plan, organize, direct, and control the functions and processes of a firm or organization. Includes instruction in management theory, human resources management and behavior, accounting and other quantitative methods, purchasing and logistics, organization and production, marketing, and business decision making.</p> <p>Office Supervision and Management An instructional program that prepares individuals to supervise and manage the operations and personnel of business offices and management-level divisions. Includes instruction in employee supervision, management, and labor relations; budgeting; scheduling and coordination; office systems operation and maintenance; office records management; organization; security; office facilities design and space management.</p> |
| <p>Computer Applications Knowledge of constantly changing computer software principles, procedures and applications including beta testing and monitoring new programs.</p> | <p>Technology, General Instructional programs that help individuals master word processing, spreadsheets, database, desktop publishing, digital media, internet research, and web content and design.</p> |
| <p>Customer and Personal Service Knowledge of principles and processes for providing customer and personal services including needs assessment techniques, quality service standards, alternative delivery systems, and customer satisfaction evaluation techniques.</p> | <p>Customer Service Instructional programs that provide individuals with an understanding of factors that influence customer perceptions and subsequent behavior. Includes instruction in developing internal customer cooperation, and external customer loyalty.</p> |
| <p>Economics and Accounting Knowledge of economic and accounting principles and practices, the financial markets, banking, and the analysis and reporting of financial data.</p> | <p>Accounting Instructional programs that prepare individuals to practice the profession of accounting and to perform related business functions. Includes instruction in accounting principles and theory, financial accounting, managerial accounting, cost accounting, budget control, tax accounting, auditing, reporting procedures, statement analysis, planning and consulting, business information systems, accounting research methods, professional standards and ethics, and applications to specific for-profit, public, and non-profit organizations.</p> |
| <p>Education and Training Knowledge of instructional methods and training techniques including curriculum design principles, learning theory, group and individual teaching techniques, design OD individual development plans, and test and design principles.</p> | <p>Adult and Continuing Education Administration Instructional programs that describe the principles and techniques of administering programs and facilities designed to serve the basic education needs of under educated adults, or the continuing education needs of adults seeking further or specialized instruction, and that prepares individuals to serve as administrators of such programs. Includes instruction in adult principles, program and facilities planning, personnel management, community and client relations, budgeting and administration, professional standards, and applicable law and policies.</p> <p>Education, General Instructional programs that generally describe the theory and practice of learning and teaching; the basic principles of educational psychology; the art of teaching; the planning and administration of educational activities, and the social foundations of education.</p> |
| <p>Mathematics Knowledge of numbers, their operations, and interrelationships including arithmetic, algebra, geometry, calculus, statistics and their applications.</p> | <p>Arithmetic Functions Instructional programs that review and practice fundamental arithmetic skills, problem analysis, problem solving, and practical applications.</p> <p>Statistics Instructional programs that introduce probability and statistics to students who have low confidence in their mathematical ability. Includes theoretical and estimated probability, simulation, descriptive statistics, and sampling.</p> <p>Business Mathematics Instructional programs that review basic mathematics and demonstrate the ability to use a ten-key desktop calculator and apply principles used in accounting, banking, insurance, finance, buying, selling, and real estate. Includes emphasizing applied mathematics through the study of word problems, time value of money, simple and compound interest, and analysis of financial statements.</p> |
| <p>Sales and Marketing Knowledge of principles and methods involved in showing, promoting, and selling products or services. This includes marketing strategies and tactics, product demonstration and sales techniques, and sales control systems.</p> | <p>General Buying Operations Instructional programs that prepare individuals to perform marketing tasks specifically applicable to obtaining goods and services for a business.</p> <p>Purchasing, Procurement and Contracts Management Instructional programs that prepare individuals to manage and/or administer the processes by which an organization contracts for goods or services to support its operations, as well as contract it to sell to other firms or organizations. Includes instruction in contract law, negotiations, buying procedures, Government contracting, cost and price analysis, vendor relations contract administration, auditing and inspecting, relations with other firm departments, and applications to special areas such as high-technology systems, international purchasing and construction.</p> |