Celebrating the Administrative Assistant's Challenges and Opportunities
Welcome Administrative Assistants!
Meet and Greet

- Who you are
- Where you live and work
- What you do
- Why you are here
Celebrating the Administrative Assistant's Challenges and Opportunities

Friday
1. Participants will explore the media reports, surveys, and guidelines and traits identified by the professional associations, as it relates to their own own experience.

2. Participants will examine the long list of what an Administrative Assistant does and collectively generate a Assistant.

3. Participants will analyze the elements of effective using them in simulated situations.

4. Participants will develop skills and strategies for engaging positively in conversations

5. Participants will understand the inevitability of conflict in the workplace, with the "boss," faculty & staff, parents, board members, parents, students, vendors, and members of the community..., and be equipped with ways to
Keeping Chaos at Bay;  
Celebrating the Administrative Assistant's Challenges and Opportunities 

Outcomes  

Sunday 
1. Participants will learn a variety of mechanisms to enhance their level of  
2. Participants will critique processes for  
3. Participants will explore the "what" and "how" of taking on responsibilities  
4. Participants will construct a guide sheet for planning and implementing projects  
5. Participants will explore the Administrative Assistant’s and options for facilitating board meetings  
6. Participants will prioritize their needs, identify resources, and share strategies for gaining support for their own  
7. Participants will recognize how to be proactive in framing and making useful their own  
8. Participants will recognize the stress level of their jobs and be introduced to specific  
9. Participants will understand the potential of and be offered the opportunity to be a part of an administrative assistant
Today’s Agenda

1. The Administrative Assistant’s Job
   a.
   b.

2. The Challenges
   a.
     i.
     ii.
     iii.
     • The Boss
     • Parents
     • Faculty & Staff
     • Board members
     • Students
     • Vendors
     • The Community
   b. i. Coping with the stressors
Sunday’s Agenda

1.
   a.
   b.
   c.
   d.
   e. Planning and Implementing Projects
   f. Board
      i.
   g.
   h. Performance Appraisal

2. Next Steps
   a.
The Administrative Assistant in Today’s World

... on your table

Best Business Jobs: Executive Assistant
US News and World Report: Money Careers
July, 2013
The Secret Weapon of Great Leaders
IAAP Survey of Administrative Assistants

International Association of Administrative Professionals
How old are you???

![Pie chart showing age ranges: Under 25 (red), 26-40 (blue), 41-55 (green), 56-70 (orange), Over 70 (gray).]
Girls AND Boys (but not many of them)!
What’s In a Title?
How long have you been there?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 years or less</td>
<td>6.5%</td>
</tr>
<tr>
<td>6-15 years</td>
<td>26.3%</td>
</tr>
<tr>
<td>16-25 years</td>
<td>29.8%</td>
</tr>
<tr>
<td>26-40 years</td>
<td>37.5%</td>
</tr>
</tbody>
</table>
What is ____

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remain in the administrative professional field</td>
<td>42.4%</td>
</tr>
<tr>
<td>Move into management</td>
<td>7.2%</td>
</tr>
<tr>
<td>Advance career within my company</td>
<td>18.9%</td>
</tr>
<tr>
<td>Change careers outside of the administrative profession</td>
<td>7.9%</td>
</tr>
<tr>
<td>Work as self-employed virtual assistant</td>
<td>4.5%</td>
</tr>
<tr>
<td>Own my own business outside of the administrative profession</td>
<td>5.1%</td>
</tr>
<tr>
<td>Retire</td>
<td>14.1%</td>
</tr>
</tbody>
</table>
How long is the workday?

<table>
<thead>
<tr>
<th>27 How many hours per week do you work?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Answer Options</strong></td>
</tr>
<tr>
<td>15-20</td>
</tr>
<tr>
<td>21-26</td>
</tr>
<tr>
<td>27-31</td>
</tr>
<tr>
<td>32-36</td>
</tr>
<tr>
<td>37-42</td>
</tr>
<tr>
<td>43+</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>28 Are you normally expected to be available for your employer outside of regular office hours?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Answer Options</strong></td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>
**Whom Do You Supervise?**

**38 Do you have supervisory responsibilities?**

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>24.8%</td>
</tr>
<tr>
<td>No</td>
<td>75.2%</td>
</tr>
</tbody>
</table>

**39 How many full-time staff do you supervise?**

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2</td>
<td>12.7%</td>
</tr>
<tr>
<td>3-4</td>
<td>4.7%</td>
</tr>
<tr>
<td>5+</td>
<td>4.2%</td>
</tr>
<tr>
<td>None</td>
<td>19.9%</td>
</tr>
<tr>
<td>Does not apply</td>
<td>58.5%</td>
</tr>
</tbody>
</table>
### 40. Do you receive and organize e-mail that is addressed to your supervisor?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>18.9%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>33.4%</td>
</tr>
<tr>
<td>Seldom/Never</td>
<td>47.7%</td>
</tr>
</tbody>
</table>

### 41. Do you manage your supervisor’s calendar?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>51.9%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>24.3%</td>
</tr>
<tr>
<td>Seldom/Never</td>
<td>23.8%</td>
</tr>
</tbody>
</table>

### 42. If Always or Sometimes, does this include personal items?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>33.5%</td>
</tr>
<tr>
<td>No</td>
<td>66.5%</td>
</tr>
</tbody>
</table>
Technology - what applications do you use?

<table>
<thead>
<tr>
<th>Application</th>
<th>Users (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word processing software (MS Word, Word Perfect, or other)</td>
<td>98.9%</td>
</tr>
<tr>
<td>Spreadsheet software (MS Excel or other)</td>
<td>97.5%</td>
</tr>
<tr>
<td>Database management (MS Access or other)</td>
<td>36.9%</td>
</tr>
<tr>
<td>Accounting software (Quickbooks, Dynamics GP, or other)</td>
<td>13.5%</td>
</tr>
<tr>
<td>Email software (MS Outlook or other)</td>
<td>96.3%</td>
</tr>
<tr>
<td>Desktop publishing product (MS Publisher, InDesign or other)</td>
<td>39.7%</td>
</tr>
<tr>
<td>Web design product (Dreamweaver or other)</td>
<td>8.1%</td>
</tr>
<tr>
<td>Presentation product (MS PowerPoint or other)</td>
<td>81.7%</td>
</tr>
<tr>
<td>Project management</td>
<td>11.6%</td>
</tr>
<tr>
<td>Virtual meeting product (WebX, GoToMeeting or other)</td>
<td>46.3%</td>
</tr>
</tbody>
</table>
### What’s Trending in Your Workload?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project management - more long-term projects</td>
<td>38.6%</td>
</tr>
<tr>
<td>Software training/troubleshooting</td>
<td>33.2%</td>
</tr>
<tr>
<td>Software adaptor (adapting software to particular company needs)</td>
<td>12.5%</td>
</tr>
<tr>
<td>Web site design, social media or content management</td>
<td>17.8%</td>
</tr>
<tr>
<td>Negotiating (contracts, clients and vendors)</td>
<td>13.6%</td>
</tr>
<tr>
<td>Online purchasing</td>
<td>34.4%</td>
</tr>
<tr>
<td>Storage and retrieval of information and file security (could be e-info, tapes, digital files, videos, paper, multi-formats)</td>
<td>30.4%</td>
</tr>
<tr>
<td>Meeting planning (includes negotiating hotel contracts, scheduling catering, preparing for Web and video conferencing)</td>
<td>47.4%</td>
</tr>
<tr>
<td>Travel planning (includes online research, booking, tracking, preparing the traveler, securing needed info such as maps, phone numbers, alternatives, emergency numbers)</td>
<td>48.5%</td>
</tr>
<tr>
<td>Desktop publishing (developing brochures, flyers, annual reports, and other items that are sent directly or electronically to the printer)</td>
<td>21.3%</td>
</tr>
<tr>
<td>Team leader dealing with virtual members (from other facilities, traveling execs, or with outside business partners)</td>
<td>13.7%</td>
</tr>
<tr>
<td>General office management/coordination/supervision</td>
<td>53.8%</td>
</tr>
<tr>
<td>Main liaison to corporate manager/VIP</td>
<td>22.9%</td>
</tr>
<tr>
<td>Planning virtual/remote meetings</td>
<td>26.9%</td>
</tr>
</tbody>
</table>
Challenges

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Juggling multiple priorities</td>
<td>410</td>
<td>335</td>
<td>620</td>
<td>811</td>
<td>761</td>
<td>3.40</td>
</tr>
<tr>
<td>Working multiple supervisors</td>
<td>983</td>
<td>531</td>
<td>554</td>
<td>498</td>
<td>371</td>
<td>2.57</td>
</tr>
<tr>
<td>Assisting a variety of people</td>
<td>532</td>
<td>523</td>
<td>730</td>
<td>674</td>
<td>478</td>
<td>3.01</td>
</tr>
<tr>
<td>Working for difficult supervisor</td>
<td>1513</td>
<td>475</td>
<td>379</td>
<td>273</td>
<td>297</td>
<td>2.10</td>
</tr>
<tr>
<td>Understanding and using technology</td>
<td>811</td>
<td>698</td>
<td>713</td>
<td>483</td>
<td>232</td>
<td>2.53</td>
</tr>
<tr>
<td>Volume of work - not enough time to complete</td>
<td>573</td>
<td>587</td>
<td>709</td>
<td>603</td>
<td>465</td>
<td>2.93</td>
</tr>
<tr>
<td>Lack of equipment/facilities to do job well</td>
<td>1462</td>
<td>740</td>
<td>454</td>
<td>183</td>
<td>98</td>
<td>1.88</td>
</tr>
<tr>
<td>Adapting to organizational changes</td>
<td>717</td>
<td>579</td>
<td>678</td>
<td>549</td>
<td>414</td>
<td>2.78</td>
</tr>
<tr>
<td>(downsizing, new management, business environment, generational differences)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work/life balance</td>
<td>599</td>
<td>565</td>
<td>802</td>
<td>572</td>
<td>399</td>
<td>2.87</td>
</tr>
</tbody>
</table>
What It Takes to be an Administrative Assistant

It takes a lot to be an effective Administrative Assistant!

Read through the Handout (group will be assigned one) and choose what your table thinks are the most important in the work of an international school Administrative Assistant. Be prepared to give a real-life example of the importance of each characteristic.

Designate one “reporter” to share with everyone your top five and why you chose them.
NAIS Guidelines of Professional Practice for Executive Assistants to the Head of School

The executive assistant to the head of school supports the head’s leadership role, and performs administrative and operational tasks to maintain an effective and well-organized office. Although responsibilities of the executive assistant to the head are as varied as the institutions they serve, the following guidelines provide a common standard of leadership and good practice for individuals vested with the responsibilities of managing the head of school’s office.

The executive assistant to the head:
1. mirrors the of School).
2. supports the head institutional projects.
3. supports the school’s board of trustees
4. embodies and communicates the school’s mission
5. provides a
6. is accessible, approachable, and discretion, respect, and sensitivity.
7. takes an
8. understands and promotes the standards leadership as standards and policies evolve.
9. fosters a partnership between faculty and staff to students’ academic and social-emotional learning.
10. respects, affirms, and protects the dignity and worth of each member of the community, and
11. sets professional boundaries
12. is a maintain high standards of performance to efficiently and effectively produce work
Administrative Assistant Job Description

Individually, study the list of tasks typical of an International School Administrative Assistant *(The Job Description That Never Ends - Administrative Assistant in an International School)*

and with your colleagues at your table, _________ own Job Description

Identify areas of agreement and differences in priorities, and explore why....

Next steps?
Communication is the process of transferring signals/messages between a sender and a receiver through various methods (written words, nonverbal cues, spoken words). It is also the mechanism we use to establish and modify relationships.
Effective Communications

Speaking

Listening

Giving Feedback
How NOT to Communicate

1. Group of 6
2. Designate one pair to each category - Listening, Speaking, Giving Feedback.
3. Look at that category Handout “

5. Prepare a 1-2 minute roleplay/skit demonstrating __________
   “good” communications, highlighting a few of the elements listed with “bad” communicating
More on Communications in

How to Tap into the Power of Silence for Effective Communication

Making Small Talk

Seven Tips for Successful Cross-Cultural Communication

What You Shouldn’t Say
Mastering Difficult Conversations
A Dozen Reasons Why Not To Have a “Difficult Conversation”

1. Desire to be Pleasing
2. Safety
3. Comfort
4. No Sense of Urgency (for me)
5. Perfectionism
6. Distrust – Of Myself or the Other
7. Not My Job!
8. Priorities
9. My Own Identity
10. Fatigue
11. Personality
12. Intent
The Cost of Avoidance

- By my silence, I condone the behavior I disagree with
- I feel like a loner - not one of makers) or
- I’m a hypocrite - I don’t “walk the talk”
- I’m a fraud - untrue to my principles!
- I’m not doing what I know I should do
- He is now in control, not me or the system
- What about the bottom line - his “victims?”
Difficult Conversations
Questions To Ask BEFOREHAND

1. Timing
2. Stakes
3. Likelihood of Success
4. Options
5. Consequences for Failure
6. Personal Perspective
7. Do-ability
Difficult Conversations - Tips

Difficult conversations require skillful use of effective communication techniques PLUS special attention to the particular challenge inherent in whatever “difficulty” is present.

Let’s Practice….
1. Pick two partners and assign roles of:
   Samantha - HoS Executive Assistant (conversation initiator)
   Sally - Admissions/Registrar Secretary
   Sasha - roleplay recorder
2. Read through the Handouts
   Turn Tough Conversations into Problem-solving Opportunities
3. Act out the scenario (next slide) - try to utilize 5-10 “helpful tips” the handouts
4. Recorder observes and records on the Record Sheet

Coaching Allowed
Difficult Conversations - Roles

Samantha - the well-meaning, efficient, skilled communicator
HoS Executive Assistant

Sally - the loner, do-it-the-same-way-we-used-to, but approachable and dedicated to the school, Admissions/Registrar Secretary

Sasha - observer and recorder
Roleplay

Sally, the admissions/registrar secretary has worked at YIS for 27 years, witnessing the growth in enrollment from a few hundred to 2,000, and the resultant increase in complexity of operation. For good and bad, it is commonly recognized that Sally is a somewhat of a loner, preferring to do things her way and not being terribly communicative, and much of her operating style seems to be stuck in the past. Somehow, though, she does the job adequately, receiving favorable performance evaluations from the Admissions Director.

You, Samantha, the Head of School Executive Assistant, frequently need Sally's help in providing data so you can prepare various reports required by the HoS. Unfortunately, over the past year, you seem to be having more and more trouble getting the needed information from Sally in a timely manner. This culminated last week when you had to go into the data base yourself to determine the nationality breakdown of the high school enrollment board meeting and previously requested (with two reminders) of Sally.

You've given a great deal of thought to the situation, asked all the "before having a difficult conversation" questions you learned at the recent NESA conference, that you must speak with Sally. You don't want to escalate the situation to a supervisory one by going to the HoS or the Admissions Director - you honestly want to resolve the issue with Sally directly, once and for all.

Your goal is to effect a change in Sally's behavior such that she provides you the data you need in a timely manner, and do so without ruining your longstanding positive relationship with her.
Dealing with Conflict

Conflict exists!

1. What creates conflict?
2. How can conflict be minimized?
3. Why deal with it?
4. Conflict resolution techniques.
5. Strategic Approach to conflict resolution.
Conflict Exists

- Human resource managers report spending 24 to 60% employee disputes.
- 60% three years, and they identified "personality conflicts" as the leading cause.
- 53% of workers said they lost time at work worrying about a past or future confrontation with a co-worker,
- 37% organization.
- 28%
- 22%
What creates conflict in the workplace?

Now, just to review, at the last faculty meeting we established that Marcia hates Fred, Fred hates Carol and Marcia, Carol really can't stand Larry, Larry despises me, and I hate Larry, Marcia, Fred, and Penny.
• weak communication
• personality clashes
• poor leadership
• Opposing positions
• competitive tensions
• power struggles
• ego
• pride
• jealousy
• performance discrepancies
• compensation issues
2. How Can Conflict be Eliminated/Minimized?

a. Define Acceptable Behavior.
a definition for what constitutes acceptable behavior is a positive step in avoiding conflict. Creating a framework for decisioning, using a published delegation of authority statement, encouraging sound business practices in collaboration, team building, leadership development, and talent management will all help avoid conflicts. Having clearly defined job descriptions so that people know what’s expected of them, and a well articulated chain of command to allow for effective communication will also help avoid conflicts. Clearly and publicly make it known what will and won’t be tolerated.

b. Hit Conflict Head-on.
intervening in a just and decisive fashion and you will likely prevent certain conflicts from ever arising. If a conflict does flair up, you will likely minimize its severity by dealing with it quickly. Time spent identifying and understanding natural tensions early on will help to avoid unnecessary conflict later.

c. Communicate!
will help to ease both the number and severity of conflicts. Avoid the biggest cause of conflict: lack of information, poor information, no information, or misinformation.

d. Control one’s emotions.
indulges
Dealing With Conflict … Do I Have To???
3. Why should you deal with it?

“Concealed, avoided or otherwise ignored, conflict will likely fester only to grow into resentment, create withdrawal or cause factional infighting within an organization.”
WAYS to handle WORKPLACE CONFLICT

- Plead ignorance!
- Make yourself appear larger than the aggressor!
- Blame the temp!
- Camouflage!
- Run!
- Play dead!
- And now IDK will present our last quarter’s...

(c) 2009-2011 IDK Comics EasierSaid.net
4. Conflict Resolution Techniques

- turn the other cheek
- compromise
- forgive
- be
- show empathy
- find common ground
- be an active listener
- put

- do the right thing

... or, you can always whine, complain, backbite, sabotage, undermine, gossip, ignore, yell at, attack, assault, take recreational drugs, hope-and-pray
5. Strategic Conflict Resolution

1. Expect conflict.
2. Approach conflict with an open mind
3. Consider what might have caused the conflict
4. Choose your battles.
5
6. Understanding the WIIFM Factor:
7. Try to cut the conflict off in its early stages
8. Listen carefully
9. Use neutral language.
10. Ask for help
11. Be sure the problem is resolved
12. View Conflict as Opportunity
OK, Let’s Get Real

• How Do You Deal With The....

• Tanks
• Snipers
• Know-It-Alls
• Think
• Grenades
• “Yes” People
• “Maybe” People
• “No” People
• Show-Nothing People
• Whiners
• Judges
• Meddlers
• Martyrs
Worksite Challenges!

Read through the descriptions of
*And How To Deal With Them*
Identify someone - boss, parent, faculty member, board member, student, vendor, colleague, etc. who fits one of those descriptions.

Share:

1. Why that label fits
2. Most recent example of behavior that frustrated you
3. How you handled it

Discuss effective ways to deal with behavior like that.
Congratulations!
You Made It

End of Day One
Celebrating the Administrative Assistant's Challenges and Opportunities
Re-Greeting

If you missed us yesterday…

• Who you are
• Where you live and work
• What you do
• Why you are here
Keeping Chaos at Bay;
Celebrating the Administrative Assistant's Challenges and Opportunities

Outcomes

Sunday
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2. Participants will critique processes for
3. Participants will explore the "what" and "how" of taking on responsibilities
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7. Participants will recognize how to be proactive in framing and making useful their own
8. Participants will recognize the stress level of their jobs and be introduced to specific
9. Participants will understand the potential of and be offered the opportunity to be a part of an administrative assistant
Today’s Agenda

1.
   a.
   b.
   c.
   d.
   e.
   g.
   h. Performance Appraisal

2. Stress-Reduction

3. Next Steps
   a. Networking
Being Organized
How to “Be Organized”

1. FOCUS! In a world where people think multi-tasking is a valued skill, it isn’t. Research proves being focused will move you faster than any other habit.

2. Focus on your “A” priority items. Many Administrative Assistants jump from an “A” priority to a “C” priority just because someone handed it to them or emailed their request. Just because something “pops” in front of you does not mean you should

3. Ask others for specific deadlines. This will help you establish your priorities.

4. Don’t confuse busyness with productivity. You can be busy on the wrong things.
   Focus on tasks that have an impact and make a difference.

5. Avoid backlogs of work by keeping information flowing. View yourself as an information

6. Early in the day, confirm the day’s priorities with your executive as they may have

7. Write a to-do list.

8. Set aside 15 minutes at the end of each day to prepare for tomorrow

9. Keep on task and do not stop for every instant message or email. Learn to set boundaries.

10. C
Tricks of the Trade

**Synonyms for**

systematized
- framed, grouped, harmonized, integrated, methodized,
- orchestrated, ordered, planned, plotted, programmed, regulated,
- righted, scheduled, schematized, sorted, stratified, structured,
- systematized, unsnarled,

At your table, brainstorm techniques, systems, strategies, and procedures you use to be organized. Identify what your table thinks are the five most useful ideas and be prepared to share with the rest of the group.
Time Management
Your Personal Time Management Analysis

mindtools.com
How Good Is Your Time Management?
Time management

Time is the scarcest resource of the manager; If it is not managed, nothing else can be managed

PETER F DRUCKER, (1909-2005), MANAGEMENT GURU

You can’t add any more hours to your day so learning to manage your time more effectively will help you plan your work more efficiently and ensure deadlines are met. Managing time effectively is a particularly crucial ingredient in successful projects. It is important to manage both your personal and professional lives because as much as you try to keep them separate they cannot help but infringe upon one another. Managing your own time will not only benefit you but those around you as well.

Within your team you will need to recognise that people work differently, some may have a structured view of working (where promptness is highly valued and most tasks are done one at a time) whereas others have a non-structured view of working (where promptness is more context related and greater emphasis is placed on multitasking). All project work requires a degree of flexibility but as a project manager you need to know when to be strict with schedules and plans and when to take a less structured approach. If your work requires you to deal with different countries then you will need to appreciate that different cultures have different perceptions of time i.e. in terms of how they view punctuality and average number of work hours.

One of the most important messages about time management is that it takes place in the present moment; the choices of how you manage your time are only available to you now.

This resource aims to help you manage your time more effectively by suggesting a number of tools and approaches that you may find applicable to your own circumstances.
Screening and Prioritizing

1. Reaction to Video

2. How do you screen demands on your and your boss’s time?

3. How do you determine which priorities to prioritize?

Each table share with the whole room the most interesting idea about how you screen and prioritize that you have discussed.
Taking On Responsibilities

1. What additional responsibilities do you hear?

2. Reasonable or not?

3. What additional responsibilities have you taken on _____ your current position?

4. Benefits and drawbacks?

5. How do you handle it when assignment/expectations grows too much?
Planning and Implementing Projects

What projects have you been asked/expected to plan and implement?
Planning and Implementing Projects

Figure 1-4. The steps in managing a project.

1. Define the Problem
2. Develop Solution Options
3. Plan the Project
   - What must be done?
   - Who will do it?
   - How will it be done?
   - When must it be done?
   - How much will it cost?
   - What do we need to do it?
4. Execute the Plan
5. Monitor & Control Progress
   - Are we on target?
   - If not, what must be done?
   - Should the plan be changed?
6. Close Project
   - What was done well?
   - What should be improved?
   - What else did we learn?
# Project Planning

## Action Plan

**Action Outcome:**

<table>
<thead>
<tr>
<th>Action Steps</th>
<th>Responsibilities</th>
<th>Timeline</th>
<th>Resources</th>
<th>Communications Plan</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A.</strong></td>
<td><strong>B.</strong></td>
<td><strong>(Day/Month)</strong></td>
<td><strong>A.</strong> Resources Available</td>
<td><strong>B.</strong> Resources Needed (financial, human, political &amp; other)</td>
<td>Special considerations; contingencies; explanations</td>
</tr>
<tr>
<td>1.</td>
<td>A.</td>
<td>A.</td>
<td>A.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B.</td>
<td>B.</td>
<td>B.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>A.</td>
<td>A.</td>
<td>A.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B.</td>
<td>B.</td>
<td>B.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>A.</td>
<td>A.</td>
<td>A.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B.</td>
<td>B.</td>
<td>B.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>A.</td>
<td>A.</td>
<td>A.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B.</td>
<td>B.</td>
<td>B.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>A.</td>
<td>A.</td>
<td>A.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B.</td>
<td>B.</td>
<td>B.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Evidence Of Progress:** *(How will you know that you are making progress? What are your benchmarks?)* 

**Evaluation of Success:** *(How will you determine that your goal has been reached? What are your measures?)* 

Date
More on Project Planning and Implementation

Fundamentals of Project Management 4th Edition

by Joseph Heagney
Dealing with the Board

1. Roles and relationships*
   a. Between-meeting behavior of board members
   b. Confidentiality
2. Meeting preparation
3. Meetings
   a. Annual Calendar*
   b. Agenda
      i. Consent Agenda
   c. Executive Session
4. Minutes
5. Other reports
6. Other
Dealing With The Board

1. Roles and relationships

2. Between-meeting behavior of board members

   questions that make you feel uncomfortable?

3. Confidentiality
Dealing with the Board- Meetings and Agendas

“Resources” Folder #16

Sample Annual Board Calendar
Board Meetings
Productive Meetings
Board Meeting Agenda
Consent Agendas
Executive Session
## Sample Annual Board Calendar

<table>
<thead>
<tr>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
</tr>
</thead>
</table>
| Welcome reception new staff  
Board Training and planning session | **Board Meeting 1**  
Reports:  
- IB Diploma report  
- University acceptances  
- Teacher entry survey  
- Parent exit survey #1 and #2  
- Admissions data | **Board Meeting 2**  
Reports:  
- Benchmark remuneration data  
- Facilities / Maintenance Data  
- Student demographic data  
- Strategic Plan Progress Report | **Board Meeting 3**  
Reports:  
- Mid year performance evaluation of HOS  
- Special needs program/enrollment data  
- Health / Safety audit report  
- Strategic Plan Progress Report | Mid year performance discussion between Board chair & HOS |
| January         | February           | March            | April             | May               |
| **Board Meeting 4**  
Budget for Approval  
Plan AGM  
AGM  
Reports:  
- MYP results  
- Admissions / student demographic report | **Board Meeting 5**  
Board Performance Self-Evaluation  
Identification of prospective new board members  
Reports:  
- Recruitment Data  
- # and Range of School events  
- Progress on Curriculum mapping  
- Extra Curricular report  
- PYP Report  
- Strategic Plan Progress Report | **Board Meeting 6**  
HOS performance Evaluation Graduation  
Reports:  
- Endicott Survey results  
- Staff exit surveys  
- Faculty appraisal data  
- Accidents data  
- Proposed staffing plan  
- Admissions data / demographics  
- Strategic Plan Progress Report |

---

Approved by Board: 4 May 2010
Professional Development for Administrative Assistants
How Much Do You Get?

IAAP 2013 Survey
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #1: You’ll be distracted from your daily work.
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #1: You’ll be distracted from your daily work.

Answer: I promise to pull my weight while taking classes; I’ll study nights and weekends, not while I’m in the office.
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #2: We can’t spare you for that amount of time.
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #2: We can’t spare you for that amount of time.

Answer: I’ll bring my laptop to the class/conference I’m attending. I’ll check in periodically to help put out any fires back at work.
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #3: The tuition costs too much.
Professional Development for Administrative Assistants
Why is it needed?

How to convince your boss to support your professional development

Issue #3: The tuition costs too much.

Answer: It will cost less to train me than to search for, hire, and train a brand new person with the skills or degree I’m studying for. I’m already a trusted member of the team. Additionally, the more invests in me, the more I’ll invest in it. I love working here and I’m not doing this to find a new job elsewhere.
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #4: How will we know you’ve gotten something out of the training?
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #4: How will we know you’ve gotten something out of the training?

Answer: I’ll take notes during classes that I’ll share when I’m back at work. I may send around a memo, create a power point presentation, or even teach a “mini” class. I’ll also outline how I’ll handle tasks better as a result of the training.
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #5: Give me a few more reasons why this training will benefit us both.
Professional Development for Administrative Assistants

Why is it needed?

How to convince your boss to support your professional development

Issue #5: Give me a few more reasons why this training will benefit us both

Answer: My Excel/business writing/social media skills will improve, and so will the quality of my work. I’ll be more productive. This improved productivity will reduce errors, speed things up and give me more time to complete extra projects—perhaps even work that’s now being outsourced, which will
Professional Development for Administrative Assistants

What Do You Need?

IAAP 2013 Survey

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Rating Average</th>
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<tr>
<td>Computer software applications</td>
<td>549</td>
<td>554</td>
<td>758</td>
<td>624</td>
<td>620</td>
<td>3.07</td>
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<td>IT systems/hardware/system networks</td>
<td>1014</td>
<td>580</td>
<td>626</td>
<td>488</td>
<td>397</td>
<td>2.57</td>
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<td>Technology applications, such as Cloud-based and virtual tools</td>
<td>562</td>
<td>486</td>
<td>696</td>
<td>678</td>
<td>683</td>
<td>3.14</td>
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<td>Project management</td>
<td>641</td>
<td>645</td>
<td>840</td>
<td>578</td>
<td>401</td>
<td>2.82</td>
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<tr>
<td>Supervisory/management skills/human resources</td>
<td>739</td>
<td>664</td>
<td>787</td>
<td>585</td>
<td>330</td>
<td>2.71</td>
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<tr>
<td>Writing and grammar skills</td>
<td>991</td>
<td>770</td>
<td>683</td>
<td>399</td>
<td>262</td>
<td>2.41</td>
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<td>Public speaking/presentation skills</td>
<td>777</td>
<td>667</td>
<td>805</td>
<td>562</td>
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<td>Negotiating</td>
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<td>648</td>
<td>759</td>
<td>465</td>
<td>273</td>
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<td>Time management</td>
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<td>740</td>
<td>680</td>
<td>430</td>
<td>283</td>
<td>2.46</td>
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<tr>
<td>Another language</td>
<td>1628</td>
<td>413</td>
<td>359</td>
<td>239</td>
<td>466</td>
<td>2.20</td>
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<tr>
<td>Teamwork</td>
<td>1218</td>
<td>673</td>
<td>650</td>
<td>327</td>
<td>237</td>
<td>2.26</td>
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<tr>
<td>Organizational skills</td>
<td>1105</td>
<td>653</td>
<td>616</td>
<td>412</td>
<td>319</td>
<td>2.42</td>
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<tr>
<td>Meeting and special event planning</td>
<td>1047</td>
<td>657</td>
<td>679</td>
<td>445</td>
<td>277</td>
<td>2.44</td>
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<tr>
<td>Website/social media management</td>
<td>738</td>
<td>517</td>
<td>742</td>
<td>622</td>
<td>486</td>
<td>2.87</td>
</tr>
</tbody>
</table>
Professional Development for Administrative Assistants

Resources

An Action Guide to Help You in Your Professional Development
National Education Association Education Support Professionals
http://www.nea.org/assets/img/content/espaction.pdf
Performance Appraisal

1. Who has had an appraisal of their job performance ______________________
2. Describe that appraisal - who did it; __________________
3. **Was it helpful**

10 Tips to Help You Ace Your Next Performance Appraisal

1. 
2. 
3. 
4. 
5. **Give your boss feedback**
6. 
7. 
8. 
9. 
10.
Stress - How Do You Cope?
Or, Like This?
What Makes You Feel Stressed?

1.

2.

3.

4.

5.

6.
Strategies That Work For You

a.

b.

c.

d.

e.

f.
10 Ways to Stay Sane (& Productive) in a Crazy Job

1. 
2. 
   you a sense of achievement.
3. 
4. 
5. 
6. 
7. 
8. 
9. 
10.
12 Ways To Eliminate Stress At Work

"40% of adults say they lie awake at night plagued by the stressful events of the day."

1. Act Rather Than React
2. Take A Deep Breath
3. Eliminate Interruptions
4. Schedule Your Day For Energy And Focus
5. Eat Right And Sleep Well
6. Change Your Story
7. Cool Down Quickly
8. Identify Self-Imposed Stress
9. Prioritize Your Priorities
10. Reset The Panic Button
11. Influence Others
12. Be Your Own Best Critic
<table>
<thead>
<tr>
<th>What matters most</th>
<th>Act; don’t react</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sense of achievement</td>
<td>Breathe</td>
</tr>
<tr>
<td>Clarify Goals</td>
<td>Eliminate interruptions</td>
</tr>
<tr>
<td>Set a positive tone</td>
<td>Schedule for focus</td>
</tr>
<tr>
<td>Set limits</td>
<td>Eat/sleep right</td>
</tr>
<tr>
<td>Get organized</td>
<td>Take an objective view</td>
</tr>
<tr>
<td>Take a break</td>
<td>Cool quickly</td>
</tr>
<tr>
<td>Praise yourself</td>
<td>Set your own standards</td>
</tr>
<tr>
<td>Take on a challenge</td>
<td>Prioritize your priorities</td>
</tr>
<tr>
<td>Develop and grow</td>
<td>Reset the panic button</td>
</tr>
<tr>
<td></td>
<td>Confront when needed</td>
</tr>
<tr>
<td></td>
<td>Pump yourself up</td>
</tr>
</tbody>
</table>
Networking

American Society of Administrative Professionals
http://www.asaporg.com/

About the American Society of Administrative Professionals (ASAP)

The producer of the annual Administrative Professionals Conference and the Executive Assistants’ Summit established the American Society of Administrative Professionals in 1996.

ASAP is focused on providing significant year-round, live and web-based training, as well as on-line resources that meet the growing demands of today’s busy Executive Assistants, Administrative Professionals, and other office professionals.

Membership to ASAP is free and includes access to on-line professional development, including live and on-demand webinars, “Learn It In A Minute” videos, articles, and columns focusing on business and career assistance, and a popular monthly Newsletter, FastTrack. Additionally, ASAP members have the opportunity to participate in a valuable Certificate program, the Professional Administrative Certificate of Excellence (PACE).

In April of 2013, ASAP launched an on-line Training Center featuring hundreds of on-demand courses focused on Office & Digital Technologies, Project & Task Management, Management Skills, Interpersonal Communications, Career Development, and more.

There are currently more than 43,000 ASAP members around the world.

Join ASAP Today! Registering is easy and FREE.
Networking
International Association of Administrative Professionals
http://iaap-hq.org/
Networking

National Association of Educational Office Professionals

http://naeop.org/
Education Support Professionals

National Day of Action: Our Schools and Our Solutions

Support the Classified School Employee of the Year Legislation

Bipartisan legislation has been introduced in both the House and Senate to institute a yearly award for the Classified School Employee of the year. Show your support for the National Classified School Employee of the Year Award Act by signing our petition! Visit edvotes.org/espaward.php and take action!
Networking

The Association of Executive and Administrative Professionals
http://www.theaeap.com/
Be a Better Administrative Professional

Learn ways to be more effective and efficient in your work. Get new ideas and tips for being more valuable in your workplace.

If you're an administrative assistant, executive assistant, secretary or administrative professional of any job title or level interested in being the best administrative professional you can be, you're in the right place. The Effective Admin resources contain information and knowledge that can turn average administrative professionals into good ones and good administrative professionals into great ones.

Browse around this site to learn about training, advice and tips for administrative assistants and executives assistants. But first please take the time to sign up in the box to the right to get your free ongoing issues of the TEA Updates newsletter for administrative professionals as well as additional publications and coupon codes good for TEA products.

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Email: [Input Field]
Job Title: [Input Field]
How did you hear about us?: [Input Field]
Sign Up
Networking

www.secretarialsite.com
http://www.secretarialsite.com/index.htm

The Role of a Secretary and Office Professional

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The secretarial role is interesting, challenging and undergoing many changes...and the changes have made the secretarial profession even more appealing.

The biggest change of all has been to the name, 'Secretary'. Did you know that Secretaries are now becoming more known as 'Office Professionals'?

Of course as the title indicates, a Secretary's role can now be expected to include some managerial duties. This could include supervising other office secretaries or administration staff or even training staff.

So just what role DOES the Secretary and Office Professional play within an organization? Do you possess the qualities to become a secretary or office professional if the role is changing? These are the questions we will give you some guidance with. You also might like to have a look at the following selection which gives you an insight into the role and some training you need right from the start of your career.
Networking

The Best Resources of All

Who is that man pointing to?
Congratulations!
You Made It

End of Day Two!
Good Luck!

Follow-up

1. Review the Resources
2. Make a Commitment to Action
3. Network!
4. Email evaluation survey

rickdetwiler2@gmail.com