Review Procedures for Staff in Secretarial and Executive Officer Grades

1. **Purpose**
   To document the University’s procedures for the review of staff in the Secretarial and Executive Staff Grades, including promotion from the Secretarial to Executive Officer Grade, accelerated promotion within both grades and promotion to the grades of Senior Executive officer grades II and I.

2. **Scope**
   The promotional review of staff in the Secretarial and Executive Officer grades is conducted by the Secretarial and Executive Staff Review Committee. Membership of the Committee is as follows: One member of the academic staff appointed by the Board of Trinity (Chair); the University Secretary (or nominee); the Treasurer (or nominee); three representatives of the Secretarial/Executive Officer staff and one representative of staff in the Executive Grades.

3. **Procedures for Review**
   Annually in August/September Human Resources circulates to Heads of School and Administrative areas details of the current salary of all Secretarial and Executive staff in their School or Areas. Heads are invited to make such recommendations as they believe appropriate for promotion or for accelerated advancement by the award of additional increments.

   The Committee assesses submissions against the following agreed criteria:

4. **Criteria for Review**
   (a) Secretarial Scale

      This is the training scale, allowing those with basic and limited experience to develop their skills, abilities and experience. The role of staff in this grade will
be developed through experience at work, and a mandatory, comprehensive training programme. The feasibility of job rotation, to enhance experience for staff in this grade, is under consideration.

**Skills and Sample Tasks**

Application of knowledge and display of competence in a variety of routine and predictable tasks. Display of some initiative. Flexible approach to working. Basic secretarial qualifications and I.T skills. Sample tasks, which may be defined as basic secretarial duties, sometimes carried out under supervision, include word processing, filing, reception, opening post, and dictation.

Staff appointed on the first three points of the secretarial scale will receive a double increment on satisfactory completion of their probation.

Secretarial staff who have completed three years’ service in the grade may be considered for promotion to the grade of Executive Officer, provided that their performance is reported as satisfactory, and is assessed as such by the Committee, and they have completed the required number of training modules and (if appropriate) a period of job rotation.

(b) Executive Officer

This is the career scale for staff with a high level of experience and skill. Staff in this grade will be expected to meet the criteria outlined below. There is no automatic promotion from this scale to any other scale.

**Criteria**

- Knowledge of the University and situation and function of own department in the context of general University activities
- Good communication skills
- IT skills, e.g. web page, spreadsheets, databases
- Ability to work on own initiative
- Proactive
- Collaboration with other areas in a broader context
• Contact with external bodies and organisations
• Taking responsibility for specific tasks and decision making
• Responsibility for meeting assigned deadlines
• Streamlining procedures in local area
• Application of management skills, prioritising, problem diagnosis, solving, time management, planning
• Some coaching and supervisory duties. Passing on straightforward instructions and monitoring work
• Quasi-administrative duties.

Sample tasks include:
• Secretarial duties, significant range of non-routine tasks
• Processing mail and work requests
• Preparing and collating booklets and course information
• Providing advice and assistance to customers and other staff. Screening telephone calls
• Committee work – e.g. drafting agendas and minutes
• Assisting in the timetabling process
• Ordering routine supplies and equipment
• Preparing statistical reports
• Reconciliation of accounts
• Assisting the Head of Department on preparation for the examining process
• Responsibility for accurate record-keeping

Cases for promotion beyond the Executive Officer scales are not automatic and are made on the basis of the criteria outlined below.
Criteria for promotion to the Senior Executive Officer Scales

Senior Executive Officer 2

In considering the criteria below, it should be noted that, in addition, it is assumed that the post encompasses the elements that are outlined in the Executive Officer Scale.

- Strong interpersonal skills
- Work on own initiative and take decisions
- Involvement in allocation of resources
- Responsibility for integrity of databases
- Ability to initiate and follow through projects
- Co-ordinating, reviewing and improving office procedures and systems, including computerisation
- Responsibility for analysis of local area problems, recommendation of solutions and implementation of effective solutions
- Responsibility for producing and analysing statistical and other reports. Verifying outputs.
- Understanding and implementation of current University issues, schemes and initiatives
- Greater level of supervision in span and scope
- Motivation of staff
- Management of inter-group / department relationships
- Application of knowledge of broad range of complex, technical, specialised work activities in a wide variety of contexts

Senior Executive Officer 1

In considering the criteria below, it should be noted that, in addition, it is assumed that the post encompasses the elements that are outlined in the Executive Officer and Senior Executive Officer 2 scales.

- High level of supervisory duties both in span and scope
- Proactive monitoring of work inputs and outputs locally
- Significant contact with external bodies and organisations in a representative capacity
• Interpretation of University policies and procedures and application of same
• Overall responsibility for projects i.e. analysis diagnosis, design, plan, execute and evaluate
• High level of financial responsibility
• Responsibility for ensuring that office meet departmental objectives
• Responsibility for ordering plant and equipment
• Responsibility for production and analysis of accounts and statistical reports
• Initiating and preparing reports
• Analysing reports and data and making recommendations
• Responsibility for setting and achieving deadlines and goals
• High degree of overall responsibility and scope of work where supervision is not appropriate
• Significant managerial role re control and deployment of resources including staff, advising Area Head about relevant issues i.e. staff training needs.