



SAUL Trustee Company: Job Description

Job title:	PA to Executive Team
Department:	Executive
Reports to	Executive Assistant to CEO
Supervises:	None

Admin & Daily duties

PA

- Support the EA to the CEO and Executive deliver comprehensive administrative and organisational support to the CEO and wider Executive team, including but not limited to:
 - In box management
 - Diary management and meeting scheduling for Executive Management Team
 - Assist with planning and co-ordinating important tasks to ensure that the Executive Management Team priorities are met
 - Providing cover for EA to CEO when on annual leave
 - Arranging annual all staff events including lunches, retirements and business plan delivery event
 - Arranging conference and meetings attendance for Trustees and Executives
 - Supporting production of PowerPoint presentations
 - Supporting EMT on Exec projects and initiatives
- Support the Committee Secretary to deliver comprehensive administrative and organisational support to the Trustee Board and Committees, including but not limited to:
 - Supporting all Board and Committee meetings with meeting scheduling, agenda setting, action log maintenance, paper production and loading to governance software system.
 - Minute taking for some Committees
 - Maintenance of Trustee governance documentation, including Skills Matrix and training
 - Maintaining resource centre library
 - Organisation of strategy days and Trustee training events
 - Supporting the running of the annual conflicts of interest and fit and proper process
 - Supporting policy management process
 - Arranging annual feedback sessions with Chair of Board and Chair of IC
 - Support work on TPR submission and maintaining Master Trust authorisation
- Support the EA to CEO and the Committee Secretary to deliver administrative and organisational support to the Investment Team, including but not limited to:



- Supporting weekly team meetings
 - Setting up Investment Manager review meetings
 - Arranging Adviser meetings
 - Maintaining resource centre library
 - Sourcing certified copies of documents
- Work collaboratively with the Executive Assistant to the CEO, Committee Secretary and Personal Assistant to the Executive Management Team to ensure delivery of excellent administrative and organisational support.
- Ad hoc administrative support for the Management Team, including supporting the Quality Management system and key business projects
- Support, including managing the annual internal meeting cycle, arranging meetings, collating and publishing the papers for various internal meetings, including but not limited to EMT, MT, Programme Board, BIG, RMG and ASG, ensuring good governance practices are followed
- Support HR with welfare gifts for staff
- Preparation of monthly expenses for company credit card holders.
- Organise travel for employees (domestic and international), including flights, hotels, transfers etc.

Office Management

- Manage the day to day running of the office, ranging from general housekeeping ensuring common areas are tidy and maintained, to supporting office moves.
- Liaising with building facilities and external suppliers to ensure visitor protocols are followed and the office is kept in well maintained order and is compliant with relevant H&S regulations.
- Management of access pass system.
- Management of back-office supplies i.e. meeting stocks and stationery.
- Managing meeting rooms and bookings, including the organisation of furniture and equipment and the provision of refreshments.
- Maintain and own department procedures and processes.
- Management of relationship with external providers (i.e. stationery provider, postal and courier services, maintenance and cleaning contractors, AV provider), including awareness of budgetary impact and constraints.



- Support the Finance function with processing of payments and supporting Trustee approval of payments.

It is the company's intention that this job description is seen as a guide to the major areas and duties for which the job holder is accountable. However, the business will change, and the job holder's obligations are bound to vary and develop, so that the job description should be seen as a guide and not as a permanent, definitive and exhaustive statement.

October 2024

Signed:	
Name:	
Date:	



Person Specification
Job title: PA to Executive Team

Requirement	Essential	Desirable	Method of Assessment
Education and Experience			
Educated to GCSE or equivalent qualification or equivalent experience including GCSE A – C passes in Maths and English	Y		CV
At least 5 years' experience in a similar role.	Y		CV CV/I
Administration experience	Y		I/T
Good knowledge of MS Office and SharePoint.	Y		I
Ability to effectively organise and prioritise own workload and multitask.	Y		I
Work well under pressure and to deadlines.	Y		I
Flexible and adaptable to short notice changes.	Y		I
Attention to detail.	Y		I
Strong professional attitude	Y		I
Strong written and verbal communication skills, with a professional telephone manner.	Y		I
Proactive approach with ability to work on own initiative.	Y		CV/ I
Experience of managing relationships with external providers	Y		
Experience of assessing and responding to non-routine work situations.	Y		I
Experience of minute taking		Y	CV/I
Skills			



Computer literate	Y		I/T
Customer focused	Y		I
Able to work well in a team	Y		I
Positive attitude to change	Y		I
Self-motivated	Y		I
Written and oral communication skills	Y		I/T