



Role-play 2

Open Competition
EPSO/AST-SC/10/20 - SECRETARIES (SC 1/SC 2)

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ASSIGNMENT

IMPORTANT NOTICE

This document presents a fictitious scenario. It has been produced solely for the purpose of this exercise. All references to existing countries, international organisations, private companies, departments and their representatives, etc. have been invented purely as examples. Any views expressed should not be taken to represent the opinions of those bodies or persons. When dealing with the assignment, participants should therefore rely solely on the information presented in the exercise and not on any formal procedures they might use in their professional life.

For this interactive exercise, you will take on the role of Lee Mandala, Secretary to the Director of the European Smart Home Agency (ESHA), located in Kustar.

Together with your colleague, Catarina Olsen, the Personal Assistant to the Director, you are in charge of the preparation of a file, which your boss will discuss with the Board of Directors during the meeting that will take place this Friday. The preparatory work started last week. However, the Personal Assistant, Catarina, became sick and has had to leave the office today. Therefore, Ezra Novac and Alex Zloti (Junior Advisors) will replace your colleague for the next 2 days.

An internal meeting has been scheduled between you and the Junior Advisors to go over the remaining preparatory work in the absence of the Personal Assistant. The aim of the meeting is for you to

- (a) discuss the various outstanding issues and
- (b) decide on the next steps to be taken in order to ensure that the file is complete.

The role-players will play the part of the Junior Advisors.

All of the necessary information is provided; it comprises a number of emails, as well as other related documents that you will have to analyse, in order to be able to deal properly with the assignment given to you.

It is important that you accept the scenario as it is presented. Although in real life you would have access to other sources of information and would be able to consult your colleagues, in this exercise you are limited to the information provided. You are, however, allowed to make logical assumptions where information is missing or incomplete.

This role-play is designed to assess the following competencies: Delivering Quality & Results, Prioritising & Organising, Learning & Development, and Working with Others. No previous knowledge is required to deal with the assignment.

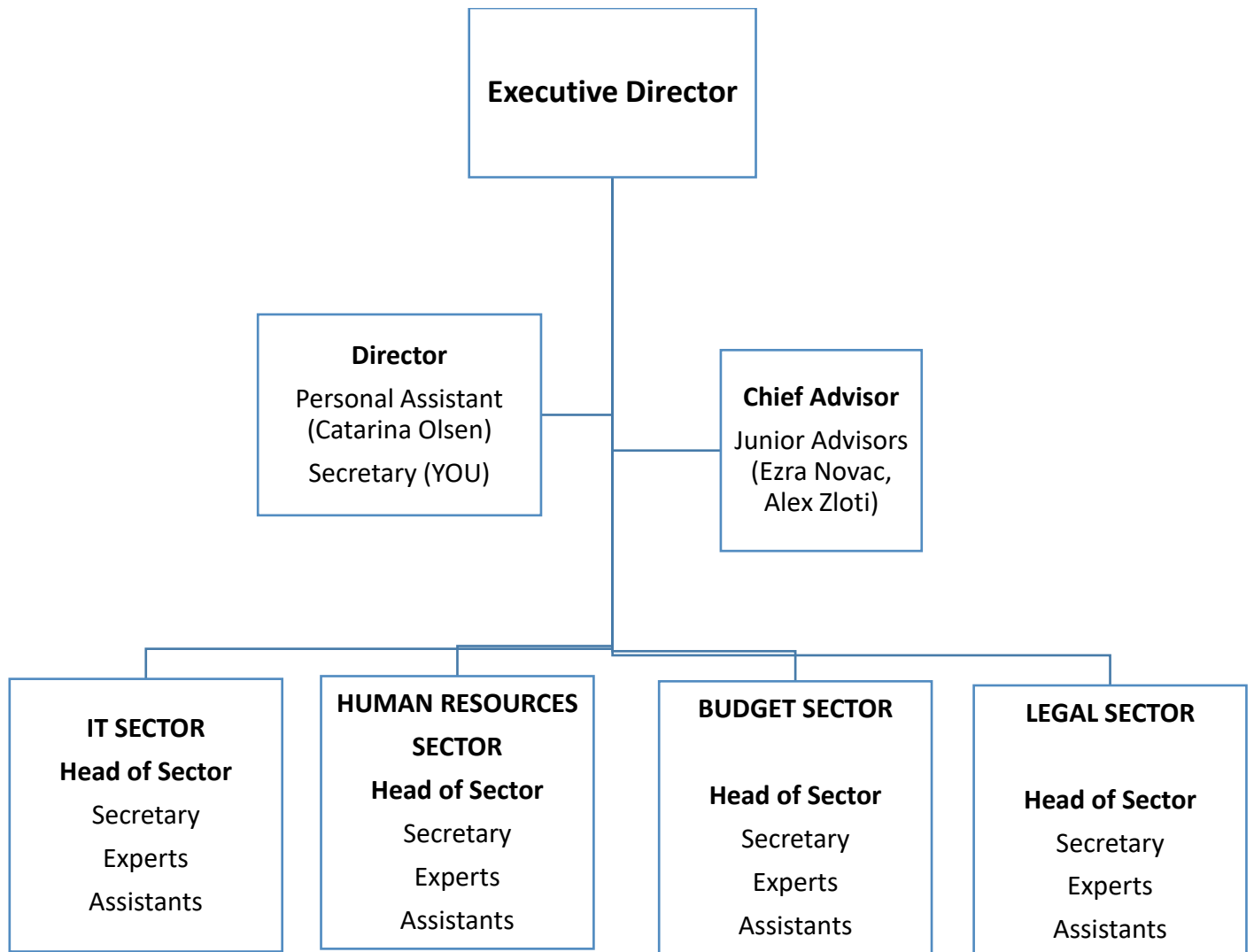
You can take notes and you may keep them with you during the role play session. You will have 20 minutes for the discussion.

Please note:

today is Monday 11 October 20XX

The interaction with Ezra Novac and Alex Zloti takes place at 10.00 today.

ORGANISATION CHART OF ESHA



ESHA OFFICIAL WORKING HOURS
 09.00-12.30 13.00-17.30
 (Lunch 12.30-13.00)

MESSAGE

New

Reply

Reply All

Forward

Delete

Move



From Catarina Olsen, Personal Assistant to the Director

Monday 11/10/202X, 09.30

To Lee Mandala, Secretary to the Director

Hi Lee,

I was not well over the weekend and I managed to see my doctor first thing this morning. Unfortunately, he has signed me off work for the next two days – at least – and I am going straight to the hospital for tests as soon as I leave the office, so it will not be possible to contact me.

I informed the Director immediately and he decided that our newly appointed Junior Advisors, Ezra Novac and Alex Zloti, would help with the preparation of the file for Friday's meeting. Of course, their experience is limited, but given your great understanding of these files, I can count on you to make sure everything is done in time.

I know that they will need a lot of support from you, as there is a lot to learn; it will no doubt put a big strain on your workload in the coming days, but this situation was completely unforeseen, and I really appreciate your support.

One last thing, I have scheduled a quick meeting between you and the junior advisors today at 10.00 to go through what needs to be done and decide on the next steps to take. They will also have a meeting with the Director before meeting you and they will share with you some additional information to take into account for the preparation of the file.

Good luck and see you later in the week, I hope.

Thanks again,

Catarina

PREPARATION OF THE FILE / BACKGROUND INFORMATION

The file includes input from:

1. HR Sector
2. Legal Sector
3. IT Sector
4. Budget Sector

Requirements for contributions:

- ✓ maximum 5 pages;
- ✓ table of contents listing key points (2-3 pre-defined key points sent to the Director for approval before drafting the contribution);
- ✓ list of colleagues responsible for drafting each key point included;
- ✓ corporate template used (can be found on common shared drive).

Steps in preparation of the file:

- ✓ Receipt of contributions;
- ✓ Verification (1) of contributions: check that requirements are met;
- ✓ Verification (2) of contributions: check that each key point is developed logically with clear comprehensible content;
- ✓ Creation of final document: insert table of contents and page numbers, check format and spelling, create new section for each sector and add contact details of the contributor(s) for each key point;
- ✓ Submission to the Personal Assistant for final check;
- ✓ Carrying out final check;
- ✓ Implementation of any last-minute changes;
- ✓ Saving of file on USB stick;
- ✓ Printing of final document;
- ✓ Preparation of folder for the Director;
- ✓ Handing over of final document to the Personal Assistant (email, USB stick & paper copy);
- ✓ Delivery of the USB stick and folder to the Director.

Deadlines:

- ✓ Submission of contributions: Friday, 8 October (by Close Of Business);
- ✓ Verification of contributions (1+2): Monday, 11 October (by 12.00);
- ✓ Creation of final document: Monday, 11 October (pm);
- ✓ Final check of file: Tuesday, 12 October (by 11.00);
- ✓ Implementation of any last-minute changes: Tuesday, 12 October (by 12.00);
- ✓ Saving of file on USB stick, printing of final document, preparation of folder for the Director, handing over of final file to the Personal Assistant (email, USB stick & paper copy): Tuesday, 12 October (by 17.00);
- ✓ Delivery of the USB stick and folder to the Director: Tuesday, 12 October (by 17.30).

DUTIES AND RESPONSIBILITIES RELATED TO THE PREPARATION OF THE FILE

A. Personal Assistant to the Director

- ✓ Oversees the preparation of the file.
- ✓ Verifies contributions (2).
- ✓ Performs the final check of the file.
- ✓ Liaises with the sectors on matters related to the contributions (Secretary to the Director in cc).
- ✓ Informs the Director of any exceptional circumstance(s) that may arise.
- ✓ Delivers the file to the Director (email, USB stick and paper copy).

B. Secretary to the Director

- ✓ Verifies contributions (1).
- ✓ Creates the document for the file.
- ✓ Submits the file to the Personal Assistant for final check.
- ✓ Implements any last-minute changes.
- ✓ Saves file on USB stick.
- ✓ Prints final document.
- ✓ Prepares folder for the Director.
- ✓ Hands over final file to the Personal Assistant (email, USB stick and paper copy).

C. Heads of Sector (HR, LEGAL, IT and BUDGET)

- ✓ Assign colleagues to provide contributions.
- ✓ Submit list of key points to the Director for approval before drafting contributions.
- ✓ Supervise the preparation of the contributions.
- ✓ Ensure that the requirements for the contributions are respected.
- ✓ Check and agree on the final contributions.
- ✓ Send contributions to the Personal Assistant (Secretary to the Director in cc) within the agreed timeframe.
- ✓ Oversee any changes requested by the Personal Assistant.
- ✓ Provide explanations, or additional information if needed.
- ✓ Update the Personal Assistant on any relevant developments.

EXTRACT FROM SECRETARY'S AGENDA

TIME	MONDAY 11 Oct	TIME	TUESDAY 12 Oct
09.00-09.45	Finalise Minutes of last meeting of the Board of Directors (for adoption this Friday)	9.00-10.30	Language course (Central Institute for Languages, city centre)
10.00-10.30	Check contribution requirements		
10.45-12.30	Greet visiting VIP Delegation for meeting with Director & attend meeting to provide administrative support and take notes for Minutes	11.00-11.45	Call restaurant to discuss lunch requirements for Board of Directors on Friday
		11.45-12.30	Make any last-minute changes in Director's file
12.30-13.00	Lunch	12.30-14.00	Team lunch
13.00-15.00	Work on file for Director & send to Catarina to check	14.15-15.00	Finalise file, save to USB stick, give to Catarina
15.00-16.00	Chair monthly Secretaries' meeting	15.00-16.00	Replacement of Director's computer
16.00-17.30	Draft Minutes from this morning's meeting	16.00-17.30	Medical appointment

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