



## **Executive Assistant Position Description**

**Job title:** Executive Assistant  
**Reports to:** Executive Director  
**Hourly Non-Exempt**

### **General Summary**

To ensure a positive experience for community and Foundation partners by handling day-to-day general operational office administration. And to serve in a supportive role to the Executive Director of the Foundation with specific responsibilities in the areas of database management, communications and grant related activities.

### **Essential Position Functions**

#### **General Office Administration**

1. Perform all general clerical duties and administrative support for successful and effective day to day operations of the Foundation. Identify and follow efficient work procedures that maximize the efficiency of all office operations.
2. Provide a positive first impression, screen all incoming calls and screen all incoming materials; prepare responses to items which can be routinely handled and forward remaining to staff as appropriate.
3. Exercise judgment, tact, sensitivity and confidentiality greeting office visitors and when engaging in contacts with Board and Committee Members, donors, leaders, and executives of various community, educational, or government organizations.
4. Oversee all office equipment to ensure it is well-functioning and the appropriate office supplies are on hand.
5. Ensure that office and meeting spaces are properly organized, cleaned, and adequately stocked and maintained creating the most suitable environment for visitors and fellow employees.
6. Organize and schedule Foundation meetings as assigned. For specified committee meetings, prepare and distribute information, reports, and materials, including notices and agendas, ensure materials are complete, accurate and timely in accordance with professional presentation standards. Record minutes/notes. Draft and distribute minutes;

maintain records of approved meeting minutes and related meeting materials.

7. Assist with the coordination and provide administrative support for the Foundation's special events as needed.
8. Organize and maintain all records for Board Manual Binders.
9. Update, maintain, and assist with the documentation for accreditation for National Standards, as required.
10. Maintain and organize files for funds and ensure consistency between agreements and all written and digital fund listings with a high respect to maintain confidential files and records.
11. Perform a variety of special assignments as needed that may require investigation, research, and presentation of findings. Proofread and edit materials to ensure appropriate format, accuracy, and clarity.
12. Assist Communications and Donor Services Manager with website and social media updates as needed.

#### **Database Management & Gift Acknowledgements**

13. Maintain and revise record-keeping and filing systems - both hard copy and electronic - to ensure accurate and efficient retrieval of records and files. Evaluate and develop improved systems and procedures, including enhanced technology for archiving and accessing materials and information.
14. Administrator of the Foundation's profile database; managing profiles to develop, track, record and update contact information on all donors, prospective donors, fund holders, professional advisors, grantees, board, committee members and community leaders. Adhere to established protocol when entering or updating data.
15. Assist with the management of all mailing lists for digital and written correspondence and marketing.
16. Provide Office support for telecommunications, computer network, I.T. and software.
17. Accurately record gift receipts for deposit, prepare all gift acknowledgement letters and special cards.
18. Prepare data and reports for Annual Report and presentations as needed.

## **Grants Administration**

19. Ensure that information about the Foundation's discretionary grant cycle and programs are made available to all nonprofit/charitable organizations serving Chippewa County.
20. Coordinate and oversee all administrative duties related to the annual grant cycle, including online grant applications, grant contracts & reporting, acceptance and denial letters, file maintenance and a variety of correspondence.
21. Provide training, technical assistance and consultation to grant applicants.
22. Prepare all resources and grant information for the Grants Committee.
23. Assist with coordinating grantee interviews, collecting quotes, photos and related information for grant stories and marketing.
24. Manage the Foundation's grants software to streamline the administration of grant making, manages grant requests, approvals and denials; Work with the Fund Accounting Manger to reconcile approved grant amounts for the grant notification letters and to generate payments.
25. Promote continuous improvement in quality and efficiency of services by revising and developing standards, investigating problems and concerns, implementing appropriate corrective actions, and providing effective direction for improvements to the grant process.

## **Periodic or Secondary Position Functions**

26. Keep current regarding trends and developments in community foundation administration, granting and software applications.
27. Take part in professional development opportunities as recommended/approved by the Executive Director.

Perform other duties as assigned. (These are intended to describe the general requirements for the performance of this job. It is not intended to be an exhaustive statement of duties, responsibilities, or requirements.)

## **Minimum Requirements**

1. Associate degree in office or business administration or equivalent experience. Coursework in business communications preferred. Ability to develop rough drafts, compose original and/or edit correspondence, including tables and forms, to ensure accurate punctuation, spelling, and grammar. Comprehensive knowledge of office procedures and filing and recordkeeping systems.

2. One to three years of related work experience resulting in advanced knowledge of operations and administration of office support functions to address administrative details; plan and prioritize work; coordinate meeting arrangements; manage general office procedures and filing and record keeping systems. Familiarity with charitable foundation policies, procedures, and structure to conduct assigned programs and projects preferred.
3. High level skills in Microsoft Office applications required, certification in Microsoft Office applications preferred. Ability to learn community foundation database software and Office specific software used in day-to-day operations.
4. High level interpersonal skills necessary to work cooperatively with others and interact effectively and courteously with a diverse group of callers and visitors and be socially perceptive in contacts with influential individuals.
5. Analytical abilities necessary to proof and edit materials, calculate and balance totals, maintain records and files, and organize and prioritize work assigned.
6. Exercises a high level of thoughtful and insightful judgment within areas of accountability.
7. Ability to handle confidential information in a professional manner.

#### **Physical and Mental Requirements**

1. Work in a normal office environment where there is no physical discomfort due to temperature, noise, etc.
2. Manipulation of objects by both hands is required on a continuous basis for computers and office equipment use, etc.
3. Requires normal hearing and sight on a continuous basis
4. Operation of a motor vehicle is required on an occasional basis
5. Daily use of stairs is required