

United Way of Lake County



Position Description

Position Title: Executive Assistant

Reports To: President and Women United (WU) Manager

Supervises: N/A

Purpose of Position:

Reporting directly to the President and CEO and Women United Manager, the Executive Assistant provides executive support in a one-on-one working relationship with both individuals. This position includes working with Board members and committees, WU members and committees and VIP donors and leadership donors.

The Executive Assistant also plays a role in senior management team; organizes communication to key constituents; and oversees special projects. The Executive Assistant must be creative and enjoy working within a small, entrepreneurial environment that is mission-driven, results-driven and community oriented.

The ideal individual will have the ability to exercise good judgment in a variety of situations with a focus on donor relationships, strong written and verbal communication, administrative, and organizational skills, and the ability to maintain a realistic balance among multiple priorities. The Executive Assistant will have the ability to work independently on projects, from conception to completion, and must be able to work under pressure at times to handle a wide variety of activities and confidential matters with discretion.

Roles and Responsibilities:

Executive Support

- Completes a broad variety of administrative tasks for the President & CEO including managing a calendar of appointments; completing expense reports; composing and preparing correspondence that is sometimes confidential.
- Plans, coordinates and ensures schedules are followed and respected. Provides "gatekeeper" and "gateway" role, creating win-win situations for direct access to the CEO and WU Manager.
- Communicates directly with Board members and their assistants and WU members.
- Proactively works closely and effectively to keep CEO and WU Manager well informed of upcoming commitments and responsibilities, following up appropriately. Acts as a "barometer," having a sense for the issues taking place in the environment and keeping the President updated.
- Provides leadership to build relationships crucial to the success of the organization both internally and externally.
- Successfully completes critical aspects of deliverables with a hands-on and personal approach, including drafting thank you letters, personal correspondence, and other tasks

that facilitate the ability to make key personal connections and build relationships with key stakeholders.

- Prioritizes his or her own conflicting needs; handles matters expeditiously, proactively, and follows-through on projects to successful completion, often with deadline pressures.
- Sits on the internal task force managing the internal database management committee.

Board Support and Liaison

- Serves as the CEO's administrative liaison in support of the Board of Directors.
- Coordinate board committee efforts including but not limited to scheduling meetings, maintaining rosters, recording minutes, etc.
- Maintain and ensure all board member information is up to date in data base systems.
- Maintains discretion and confidentiality in relationships with all board members.
- Adhere to compliance with applicable rules and regulations set in bylaws regarding board.
- Attends to Board Meeting prep, including advance distribution of materials before meetings in electronic/paper format.

Senior Management Liaison

- Participates on the Senior Team and includes scheduling and attending weekly meetings.
- Assists in coordinating the agenda of senior management team meetings retreats and all-staff meetings.

WU Member Liaison

- Provides a donor-centric interface with members and builds relationships.
- Provides support and information directly to WU members as needed.

WU Renewals management and member onboarding

- Executes the annual renewal process.
- Coordinates regular communication and cultivation of members.

WU Calendar event and meeting support

- Manages annual calendar of all WU events and works with WU Manager to handle.
- invitations, RSVPs and calendar updates.

WU Data collection and management

- Proactively maintains and oversees donation tracking.
- Maintains annual WU outcomes data.
- Maintains all member information including building personal donor profiles based on information from personal communications.
- Support WU Manager in the use of Group Zone, Sign Up Genius and Survey Monkey.

Key Competencies:

1. Strong organizational skills that reflect ability to perform and prioritize multiple tasks seamlessly with excellent attention to detail.

2. Very strong interpersonal skills and the ability to build relationships with stakeholders, including staff, board members, Women United members, external partners and donors.
3. Demonstrated proactive approaches to problem-solving with strong decision-making capability.
4. Emotional maturity.
5. Highly resourceful team-player, with the ability to also be extremely effective independently.
6. Proven ability to handle confidential information with discretion, be adaptable to various competing demands, and demonstrate the highest level of customer/client service and response.
7. Demonstrated ability to achieve goals and meet deadlines in a fast-paced environment.
8. Forward-looking thinker who actively seeks opportunities and proposes solutions.
9. Appreciates and understands his/her critical customer-facing role, has interest in relationship-building and enjoys personal interaction.
10. Takes initiative to help, suggest and work on items without being asked.
11. Strives to improve all aspects including processes and systems. Must think critically and understand how individual tasks fit into the strategic whole.
12. Solid writer with strong verbal communication skills.

Education and Experience Requirements:

- High school degree or college degree required.
- Strong work tenure: Five+ years with secretarial/administrative experience.
- Experience and interest in internal and external communications, partnership development and fundraising.
- Proficient in Microsoft Office (Outlook, Word, Excel, and Power Point), database management, Adobe Acrobat and Social Media and web platforms.

Other:

- Must have reliable internet access.
- May need reliable transportation.

Physical Requirements:

While performing the duties of this job, the employee is occasionally required to sit, stand, walk, lift and carry bags and boxes of approximately 10 pounds; talk or hear, read, use hands to finger, handle or feel objects, reach with hands and arms; climb stairs, stoop, kneel, or crouch, type, operate a computer, copy machine, fax machine, postage meter.