



## Job Description

**Job title:** Administrative Assistant  
**Reports to:** Senior Philanthropic Services Officer  
**FLSA status:** Non-exempt

### General Summary

Provides support through high-level computer training/experience and database management skills. Enhances the capacity of the philanthropic services and affiliate and supporting organizations teams by performing various duties as assigned. Provides general office and administrative support activities for philanthropic services and affiliates and supporting organizations teams. Receives and screens visitors and telephone calls and operates standard office equipment. Activities include but are not limited to data entry, organizing and scheduling meetings, recording and drafting meeting minutes, and preparing a variety of reports, correspondence, presentations, and other documents. Assists with preparing and distributing meeting materials in accordance with quality and timeliness standards, establishing and maintaining files and corporate records.

**Principal Duties and Responsibilities** (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. All duties are to be performed in accordance with established Community Foundation policies, standards, and protocols.)

### Administrative Support

1. Provide general administrative support to philanthropic services and affiliate and supporting organizations team members in our four-county region. This may include coordinating and monitoring schedules, maintaining files, making copies, creating reports, mail-merge, webinar setup, or other administrative tasks.
2. Assists the philanthropic services and affiliates and supporting organizations teams, as well as other teams as assigned within the Community Foundation, to include new agency profile entries, data entry of grant requests, creation and management of grant lists, and other related activities as needed during grant rounds.
3. Drafts letters, reports, tables, forms, and other documents using Microsoft Office software applications. Proofreads and edits materials for appropriate and consistent format, accuracy of data, correct punctuation, spelling, and grammar.

4. Supports the Board of Directors of The Bridging Generations Fund and the Board of Trustees of the Amazing X Charitable Trust.
5. Drafts and distributes minutes for specified committee meetings; maintains records of approved meeting minutes and resolutions.
6. Performs a variety of related office and administrative duties including but not limited to front desk reception and operation of standard office equipment.
7. Assists with opening, sorting, recording, and distributing mail according to established procedures, as well as pick-up and delivery of mail to post office.
8. Supports staff members in various departments by performing general office duties such as delivering correspondence, scheduling appointments and appropriate meeting rooms, facilitating set-up and clean-up for various meetings. Contacts vendors, staff, or other individuals by telephone to confirm scheduling of meetings, appointments, or conferences.
9. Travel within four-county service area.
10. Assist with donor services by processing new fund agreements and collaborating with administrative team in maintaining fund folders and files as well as monitoring existing funds.
11. Cover front desk reception duties for lunch and breaks as needed.
12. Performs other duties as assigned.

#### **Data Entry and Information Management Systems**

1. Responsible for assistance in establishing, maintaining, and revising recordkeeping and filing systems—both hard copy and electronic—to ensure accurate and efficient retrieval of records and files including corporate documents. Works with staff in evaluating and developing improved systems and procedures, including enhanced technology for archiving and accessing materials and information.
2. Posts information to records, logs, spreadsheets, or custom database applications in accordance with specific directions. Checks and verifies data and data entry to ensure accuracy. Maintains recordkeeping and filing systems for office and staff. Classifies, sorts, and files correspondence, records, and other documents.
3. May prepare daily check log in accordance with Community Foundation procedures as needed.

4. Adheres to established protocol when entering or updating data.

### **Professional Development**

5. Keeps current regarding trends and developments in community foundation administration as well as software applications through reading of professional literature and attendance at appropriate seminars, conferences, and workshops.
6. High-level skills in Microsoft Office applications required, certification in Microsoft Office applications preferred. Must learn Foundant Technologies software.

### **Knowledge, Skills, and Abilities Required**

1. At a minimum, completion of an associate degree in office or business administration. Coursework in business communications preferred. Ability to develop rough drafts and 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 in order to address administrative details, plan and prioritize work, coordinate schedules and meeting arrangements, manage general office procedures, and filing and recordkeeping systems. Familiarity with charitable foundation policies, procedures, and structure to conduct assigned programs and projects preferred.
3. Knowledge and skill in utilizing Microsoft Office and software applications; ability to operate a wide variety of office equipment.
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.
8. Comfortable working in various locations and with varying technology.
9. Flexibility in scheduling and ability to travel.