

## **Community Foundation of North Louisiana: Executive Assistant (2023)**

The CFNLA Executive Assistant oversees and coordinates the daily functions of the Foundation office and serves as an executive assistant to the Chief Executive Officer and the Chief Financial Officer. In addition, the Executive Assistant ensures the goals of the Foundation are accomplished in a professional, efficient, and timely manner, through careful planning and management.

Full-time position. Benefits include employee health insurance and retirement plan.

Reports to: Chief Financial Officer

### Principal Responsibilities:

- I. Executive Assistant
  - a. Provide clerical and other support for the Chief Executive Officer and the Chief Financial Officer, including, but not limited to:
    - i. Filing;
    - ii. Mail;
    - iii. File Creation;
    - iv. Scheduling meetings;
    - v. Gathering and preparing presentation materials;
    - vi. Gathering and preparing donor materials; and
    - vii. Handling all restaurant reservations and orders for internal and external meetings.
  - b. Work on any projects that may be assigned from time to time by Chief Executive Officer or Chief Financial Officer.
- II. Office Duties
  - a. Monitor CFNLA general email account.
    - i. Monitor email at least twice daily and forward emails to appropriate employees.
  - b. Maintain all electronic files by scanning and saving documents and adding to Foundant, where appropriate.
  - c. Greet all visitors and callers hospitably and direct them according to their needs.
  - d. Answer requests for general information and make appropriate referrals for more specific information about Foundation business and programs.
  - e. Place outgoing mail in US Mail at 2:00 p.m.
  - f. Assist in management of all Foundation databases including, but not limited to Foundant.
  - g. Serve as the Foundation's technological and equipment resource, including computer, phone and email systems.
  - h. Maintain an accurate file system and library for the Foundation.
  - i. Create templates for all routine correspondence, agreements, and reports.
  - j. Monitor cleanliness of office and Community Central.

- i. Start and unload dishwasher when needed.
    - ii. Prepare coffee every morning and clean up coffee pot, etc., in late afternoons.
  - k. Birthday Cards and Correspondence
    - i. Recognize board members, volunteers, and donors with cards for birthdays, illnesses, and holidays.
    - ii. Anniversary Cards
      - 1. Prepare anniversary cards monthly for fund advisors.
    - iii. Sympathy and Other Cards/Correspondence
      - 1. Prepare and send sympathy and/or other cards or correspondence when instructed by CEO, CFO or CGO.
  - l. Manage petty cash.
  - m. Maintain calendar for Community Central.
  - n. Organize staff birthday celebrations.
  - o. Monitor office and kitchen supplies and prices. Orders supplies when appropriate.
  - p. Monitor and schedule all office service providers and/or repair personnel.
  - q. Maintain current proof of auto insurance for all employees.
  - r. Perform other miscellaneous general office duties and errands as needed.
- III. Donation and Receipt Responsibilities
  - a. Enter into Foundant all receipts daily and prepare and send acknowledgment letter(s) for same.
  - b. Make electronic deposits daily.
  - c. Prepare and send acknowledgements for all contributions.
- IV. Finance and Accounting Duties
  - a. Maintain credit card receipts from all employees and create monthly spreadsheet for all charges.
  - b. Assist with Fund Statement Distributions on a quarterly basis.
- V. CFNLA Board of Directors Administrative Duties
  - a. Provide administrative help for all CFNLA Board and Committee Meetings as follows:
    - i. Maintain rosters of Board and committee members;
    - ii. Send email/calendar notices of Board and committee meetings;
    - iii. Create and circulate initial draft of Board or committee meeting agendas listing all grants that need board ratification or approval;
    - iv. Compile and timely distribute materials needed in preparation for or use at Board or committee meetings;
    - v. Perform all necessary arrangements to ensure efficient and comfortable Board meetings held at Foundation;
    - vi. Take minutes at board meetings; and
    - vii. Prepare typed minutes following Board Meetings to be distributed to Board following the meeting.