Job Description

Job Title:	Executive Assistant, Engagement
Department:	Office of Advancement
Reports To:	Associate Vice President, Engagement
Jobs Reporting:	None
Salary Grade:	USG 7
Effective Date:	May 2024

Primary Purpose

The Executive Assistant, Engagement (EA) is responsible for providing overall administrative support for the engagement team as well as operational project management and support for the Alumni Relations (AR) team that contributes to team success. The position carries out a wide variety of Alumni Relations projects, activities, and support and ensures that the team operates in an efficient and professional manner. The primary functions are project management and coordination of Alumni Relations activities, outstanding customer service that fosters and strengthens relationships between alumni, donors, friends, volunteers and the University along with confidential support and project coordination towards priorities of the team's senior leadership. The areas of responsibility are 90% Alumni Relations, 10% Engagement team.

Key Accountabilities

Advisory

- Provide advice, critical analysis, and reporting to the AVP, Engagement on issues impacting the university's Alumni Relations, Alumni and Donor Experience, Annual and Planned Giving activities
- Contributes to the development of strategic and operational goals, plans and initiatives in support of department objectives and the University's strategic priorities.

Administrative / Executive Assistance

- Provides a wide-range of administrative support to the team's senior leadership
- Supports Engagement senior leadership scheduling, arranges meetings, including with senior alumni volunteers, donors and external partners.
- Manages Engagement Senior Leadership travel arrangements and completes travel and other expense claims on their behalf.
- Manages the engagement leadership's calendar and prepares contextual materials.
- Manages the facilitation and execution of virtual, hybrid and in-person meetings; including booking facilities, drafting agendas, preparing presentations and reports, managing technology, taking minutes and producing meeting notes, handling responses and attending to special requests.
- Primary lead for supporting the administrative work of Alumni Council.
- Primary lead for supporting the administrative work for Alumni Professionals Group
- Creates briefing notes for all external alumni meetings, ensuring quality, accuracy and input of information to the CRM so information is current and relevant.
- Researches and prepares alumni correspondence (including condolence and congratulatory letters) using complex data.
- Interacts with the Office of the President, Provost, VP Advancement, other administrators and key external and internal stakeholders to relay information, seek advice, and engage parties in meetings.

- Interacts with key senior alumni volunteers (including Alumni Council) to arrange meetings; support task forces, gather information; facilitate visits; prepare materials, reports and presentations. This often requires the coordination of several individual's calendars in several geographic locations.
- Performs research to garner information pertaining to alumni to assist in the preparation of reports, briefing notes, letters, agendas, call packages, training notes, and a variety of other materials; performs initial review of material to analyze, sort, resolve issues, and answer queries.
- Manages and executes new staff onboarding, equipment set up & training on behalf of the Senior Director, Alumni Relations
- Organizes and supports Engagement team activities.
- Provides assistance for both routine and confidential correspondence and filing
- Provides administrative training to co-op students, oversees completion of tasks, and provides guidance and feedback.

Program management and project support

- Represents the team in a professional manner at all times; anticipates requirements and assembles material and notes for meetings and appointments.
- Manages the alumni@uwaterloo.ca email inbox and provides excellent customer support by responding to alumni inquiries and information requests in a timely and professional manner.
- Provides a wide range of administrative support for events and activities for all team members including but not limited to; shipping, menu planning, venue liaison, booking facilities, parking requirements, supply purchases, registration, attendee lists, etc.
- CRM Database: updates and inputs pertinent information in a timely manner, ensuring actions are current and accurate, assists with mass uploads for the Engagement team.
- Event database; supports campus-wide alumni events through creation of events into a database providing updates when requested.
- Management of supply inventory, including event supplies (i.e.. Nametags, swag, etc.), for the team
- Management of the Alumni Benefits & Services program which includes creating and maintaining partnership relationships with external vendors offering incentives to alumni as well as the creation and management of partnership web pages.

Financial and budget management

- Delegate for Engagement senior leadership in approving all expenses through Unit4.
- Assists the Senior Director, Alumni Relations in overall budget management through ongoing management and reconciliation of annual program area budgets.
- Manages monthly budget reconciliation by creating and distributing Unit 4 reports, cross referencing and updating budget tracking sheet and organizing invoices.
- Provides regular account updates to the Senior Director, Alumni Relations.
- Ensures the day-to-day financial activities are carried out according to best practices and comply with University policies and procedures.
- Queries the financial system for specific details and liaises with various billing points, on and off campus, to solve invoice irregularities.
- Acts as reviewer and/or prepares travel and expense claims submitted by the Engagement senior leadership team.
- Prepares invoices for advertising and sponsorship with internal and external vendors.
- Back-up for daily and monthly event reconciliation between the Advancement and the Finance systems including the processing of refunds.
- Manages the unit Purchasing Card, including reconciliation of accounts, payment of invoices, tracking of purchases and reconciliation of monthly statement.
- Manages and facilitates team training on budget tracking, reconciliation, invoice submission, account codes, naming conventions and overall financial processes.

Special Projects

- Assists Senior Director, Alumni Relations with business operations of the *Waterloo Magazine* through managing the invoicing.
- Assists Senior Director, Alumni Relations with the creation and distribution of the alumni engagement survey every 4 years.
- Provides event support for Alumni Relations activities throughout the year as needed.
- Manages distribution and assessment of all alumni packages.
- Manages recipient lists and distribution of special mailings to honour and thank alumni, volunteers, and donors.
- Writes and maintains procedures and trains other colleagues as a back-up for all job duties.
- Assists with planning and execution of key campus visits.
- Maintains event table registrations and invitee lists for events where Alumni Relations' hosts a table of high profile external constituents.
- Other duties as assigned

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Required Qualifications

Education • University undergraduate degree , or equivalent combination of education and/or experience
Experience • 5+ years of experience in an administrative role • Administrative experience in a complex, dynamic and fast-paced environment necessary with ability to manage multiple priorities concurrently and accurately. • Experience working within a campus environment and specifically within advancement an asset
Knowledge/Skills/Abilities • Extremely detail-oriented with strong keyboarding skills, sound judgment, organization skills, tact, and diplomacy are essential. • Ability to manage conflicting deadlines, priorities, and high-pressure situations. • Strong writing and/or editing skills. • Must have initiative, and enthusiasm and be an independent thinker who thrives in a cooperative team environment and the ability to work in an environment that is continually growing and changing. • Must be comfortable in high-profile networking environments, continually developing new relationships. • Ability to communicate efficiently with internal and external audiences. • Professional, customer service-oriented personality. • Proactive project management skills and ability to complete complex tasks professionally and on time. • Proficient in MS Office (intermediate), internal document sharing software, CRM databases, relational databases, and web content management systems. • Proficient with meeting software. • Ability to learn new software quickly.

Nature and Scope

- **Contacts:** Internally, communicates and works with all Advancement contacts and areas across campus related to Engagement programs, committees and processes. Externally, communicates and works with alumni, donors, volunteers, university partners, stakeholders, parents and corporations. Communications will include exchanging information, collaborating, troubleshooting, organizing, and providing feedback.
- **Level of Responsibility:** Provide administrative support to all team members, and specifically the Engagement senior leadership team. Establishes specific goals and areas of focus in consultation with the Senior Director, Alumni Relations. Must be able to make informed decisions cognizant of broader accountability in role representative of the broader university, be proactive in contributing and communicating ideas to other team members, participate in team planning exercises, meetings, and demonstrate tact in dealing with those with differing ideas and opinions.
- **Decision-Making Authority:** Recommend program modifications when necessary. Determine task priority in a multi-tasking, deadline-oriented environment. Ensure the Engagement team materials are displayed and for use with internal and external constituents where appropriate and are accurate. Determine the team's equipment and supply requirements.
- **Physical and Sensory Demands**: Typical of an administrative position in an office environment. The role requires a significant physical effort with the lifting and transportation of frames, event toolkits, portable banners and other event-related tools to various locations on and off campus. The role also requires the set-up and take-down of event locations which could include moving and rearrangement of chairs and tables. The incumbent(s) should be extremely detail oriented and be able to work within different cultures globally; peak times can include many simultaneous demands.
- **Working Environment:** Typical office environment. Must have the ability to juggle multiple deadlines and interact with a diverse client base. Willingness and ability to work evenings and weekends as required; some travel in the GTA area or within a 3 hour driving distance from Waterloo, may be

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required in this position