

## Job Description

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<b>Job Title:</b>	Executive Assistant
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Associate Vice-President, Advancement Services
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 7
<b>Effective Date:</b>	March 2015

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### **Primary Purpose**

Reporting to the Associate Vice-President, Advancement Services, the Administrative Assistant performs a wide variety of financial, administrative and operational duties that contribute to the success of Advancement Services. This position also provides executive administrative support to the Advancement Services senior management team and is key participant in a number of programs.

### **Key Accountabilities**

*List the major responsibilities of the job, divided into 3 to 5 broad categories. These should reflect 80 - 90% of "what" the job does not the "how". Insert a category heading and in bullet form below, state specific responsibilities.*

#### **Administrative/Executive Assistance**

- Provides support to the Associate Vice-President through detailed management of his calendar; organizing and attending meetings; booking facilities, equipment and refreshments; drafting agendas; preparing handouts and reports; assisting with electronic presentation notes or other supporting materials; taking minutes and producing meeting notes, handling responses and attending to special requests;
- Provides assistance for both routine and confidential correspondence and filing;
- Handles simple and complex document preparation using Word, Excel and/or PowerPoint software packages;
- Proofs documents for quality control;
- Anticipates requirements and assembles material and briefings for meetings and appointments;
- Posts job recruitment notices externally as requested;
- Maintains departmental organizational charts;
- Assists in maintenance of vacation, illness and leave tracking for staff; reconciles vacation allocation from year to year;
- Coordinates CASE and CCAE memberships for Advancement and reviews for the University;
- Facilitates professional development webinars including bookings, facilities, equipment and RSVP's for ADRP and AFP (approx. 15-20 each year);
- Coordinates confidentiality agreements which are renewed annually and as new users start as well as file retention electronically and/or in paper form;
- Inputs action notes on Raiser's Edge as requested;
- Works closely with the senior managers in Advancement Services, carrying out a variety of tasks and ensuring that their activities operate in an efficient and professional manner.

#### **Financial Responsibilities**

- Monitors and reconciles expenses on FORE, and consults with Finance as required; distributes FORE reports to various managers;

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- Acts as departmental resource for querying the Financial System for specific details, prepares special summary reports on expense activity for some program areas, tracks down invoice irregularities, liaises with various billing points on and off campus, and prepares JV's for funds' transfers/corrections;
- Collects and maintains a filing system of invoices, payments and other financial paperwork for ten organizational units for all transactions with a total budget of >\$8M;
- Custodian of the petty cash fund for the department, including reimbursement and record keeping;
- Manages the departmental Purchasing Card, including reconciliation of accounts, payment of invoices, tracking of purchases and reconciliation of monthly statement;
- Coordinates monthly, bulk and default, pledge reminders sent by email and mail; this includes triggering reminders, generating statistics, correcting/updating coding on RE, and marking actions complete;
- Initiates salary payments for contracted services, and non-salary payments as directed;
- Acts as reviewer and/or prepares travel claims submitted by staff;
- Prepares and processes paperwork required for payments to internal and external vendors which includes assigning applicable financial accounts; this includes cheque requests, invoices, etc..

### **Donor Relations/Stewardship Support**

- Participates in planning, maintaining, implementing a structured, systematic program for annual endowment/trust stewardship reporting; involves data collection and manipulation, and complex report generation using data from various sources;
- Sets up and maintains coding structures on the database relative to stewardship reporting projects which includes entering terms and relationships on RE as well as verifying information;
- Gathers information from multiple fund custodian sources (Finance, SAFA, GSO, Faculty/Departmental offices); to merge and manipulate data for letters and financial reports;
- Identifies and researches fund anomalies, communicates broadly with stakeholders;
- Preparation and report distribution, requesting a global update of the database after reports have gone.

### **Office Operations and Physical Resources Planning and Organization**

- Authorizes and distributes departmental keys/fobs to staff; holds duplicate keys for all furniture in the office;
- Authorizes and co-ordinates telephone billing and equipment relocation for all Advancement staff and meeting rooms;
- Co-ordinate telephone listings for UW directory.

### **Other**

- Maintains a portion of the Advancement SharePoint site, ensuring the most recent policies, templates, procedures, forms, etc. are posted and old versions removed;
- Maintains various lists and calendars and distribute when necessary;
- May schedule travel arrangements, registrations, campus visits as requested;
- Provides Reception backup during breaks, lunches, and holidays;
- Other duties as assigned.

## **Required Qualifications**

*If hiring today, what would be the required education, experience, knowledge, skills and abilities?*

### **Education**

- University undergraduate degree or related experience.

### **Experience**

- 3-5 years of administrative experience.

### **Knowledge/Skills/Abilities**

- Proficient with Microsoft Office
- Experience with SharePoint and Raiser's Edge an asset
- Experience with FORE, Adobe Pro and Visio an asset
- Ability to develop and maintain excellent relationships
- Ability to assist with events
- Sound judgement and problem solving skills

### **Nature and Scope**

- **Contacts:** Internal: the Advancement Services team, Office of Advancement staff, Development and Alumni Officers across campus, Finance, Student Awards Office, Graduate Studies Office, Plant Operations, Central Stores, University Relations, Marketing and Strategic Communications and the Secretariat. External: prospective donors, donors, alumni and external suppliers.
- **Level of Responsibility:** The position has defined specialized and routine tasks. The Assistant receives specific guidance but is expected to perform duties independently with outstanding customer service, sound judgment, a strong work ethic and an ability to take initiative where minimal direction is provided.
- **Decision-Making Authority:** Some decision making authority. Problems, recommendations and decisions typically involve day-to-day operations within established policies and procedures. The Associate Vice-President will be consulted when a problem falls outside of established procedures or policies, or when a conflict has arisen with an internal or external contact.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative assistant position working in an office environment.
- **Working Environment:** Travel: Occasional travel may be required. Working Hours: Regular working hours with occasional evening and weekend work required. Minimal exposure to disagreeable conditions.