

Reports to: Chief Financial Officer with a dotted line to the Executive Assistant to the President | CEO
Status: Non-Exempt

Job summary

The **Administrative Assistant** is a key support role within the foundation, assisting the offices of the Chief Financial Officer (CFO) and the President | CEO in daily operations and ensuring efficient office operations. This in-office position reports to the CFO and provides direct support to the Executive Assistant to the CEO | Corporate Secretary. This position plays a vital role in facilitating effective communication, managing schedules, and handling administrative tasks for the Finance and Executive teams. The Administrative Assistant is also the primary back-up for the Office Coordinators (front desk reception), ensuring continuity of office operations in their absence. With a focus on attention to detail, exceptional organizational skills, and the ability to prioritize effectively, this role directly contributes to the productivity and organizational efficiency of the Finance and Executive teams and the overall office environment.

Essential Duties and Responsibilities

Calendar Management and Logistics

- Manage calendar of the CFO and support the Executive Assistant to the CEO/Corporate Secretary with management of the calendar of the President | CEO.
- Partner with the Executive Assistant to the CEO/Corporate Secretary to provide excellent service and administrative support to the Board of Directors and the office of the President | CEO.
- Coordinate logistics for meetings and events, including room bookings, agendas, Board books, and preparing necessary materials.
- Assist with the management of complex schedules, ensuring all meetings, deadlines, and commitments are efficiently prioritized and attended to.
- Manage travel arrangements and accommodations for leadership team members.

Financial and Document Administration

- Prepare expense reports.
- Consolidate investment performance data for approximately 300 funds on a quarterly basis.
- Document management, including electronic document retrieval and filing, filing of mail, and ensuring compliance with Gulf Coast's record retention policy.
- Provide administrative services to support investment oversight, interacting with Gulf Coast's outsourced chief investment officer, external professional investment advisors, and Gulf Coast staff.
- Deposit checks daily in accordance with Gulf Coast procedures.
- Notarize documents as needed.

Business Communications

- Write and deliver business letters as needed.
- Manage timely execution of authorized signatures on Foundation documents.
- Coordinate processing of cards to donors, Board members, and other stakeholders.
- Process gift acknowledgment letters to donors.

Project and Task Management

- Assist in the coordination and tracking of ongoing projects for leadership, ensuring timely completion of action items and deliverables.
- Provide project management support, ensuring deadlines are met and key objectives are on track.
- Prepare reports, presentations, and other materials needed for meetings.
- Assist the CFO and Executive Assistant to the CEO | Corporate Secretary with special projects and high-priority tasks as needed.

Office Coordination and Reception Support

- Serve as the primary back-up for office coordinators, including greeting visitors and providing exceptional service in every interaction, professionally and efficiently field incoming phone calls, process daily mail and checks, and handling general inquiries.
- Ensure smooth office operations in the absence of the office coordinators, including maintaining office supplies, and ensuring proper setup and breakdown of meeting spaces.
- Maintains seamless daily operations and promotes a positive work environment through efficient organization and communication.

Required Education and Experience

- High School Diploma or equivalent
- Minimum of 2 years of experience in an administrative role
- Notary public, or commitment to obtaining designation within 6 months of hire
- Proficiency in Microsoft Office suite (Word, Excel, PowerPoint) and office technology
- Maintains absolute confidentiality and exercises exemplary discretion in handling sensitive information, including donor records, investment data, financial transactions, and internal foundation matters. Must demonstrate a thorough understanding of the critical role confidentiality plays in maintaining donor trust and professional advisor relationships
- Strong organizational skills and attention to detail, with an ability to prioritize and manage multiple competing tasks and deadlines
- Strong written and verbal communication abilities
- Exceptional customer service orientation
- Strong interpersonal skills and ability to build positive relationships
- Ability to work independently and collaboratively with a high degree of professionalism.

Preferred Qualifications

- Experience supporting a leadership team or executive-level staff.
- Familiarity with calendar management and travel coordination for multiple team members.
- Strong background in organizing and prioritizing tasks for executives or senior leaders.
- Experience with project management tools and systems.
- Strong problem-solving abilities and a proactive approach to task management.
- Prior experience in front desk or office coordination roles, with the ability to cover reception duties effectively.

General Physical Requirements

- Sedentary work: exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently to move, transport, position, install or remove objects weighing up to 10 pounds across office or various outdoor locations.
- Sedentary work involves remaining in a stationary position most of the time. Occasional moving about and maneuvering objects. Occasionally moves items weighing up to 10 pounds, exerting over 10 pounds of force. Recurrent repetitive motion (such as typing) is involved in performing this role.

Working Conditions

- This is an in-office position, with the expectation of working on-site in the Venice Headquarters, with the flexibility to work at the Sarasota Philanthropy center when needed when covering for the Office Coordinator.
- The employee is not substantially exposed to adverse environmental conditions.
- Events may take place off-site and may necessitate exposure to weather elements.
- Ability to work from multiple locations as needed.

Disclaimer

The employee must be able to perform the essential functions of the position satisfactorily and, if requested, reasonable accommodations will be made to enable employees with disabilities to perform the essential functions of their job, absent undue hardship for the employer.

Acknowledgement

I have carefully read and understand the contents of this job description. I understand the responsibilities, requirements and duties expected of me. I understand that this is not necessarily an exhaustive list of responsibilities, skills, duties, requirements, efforts or working conditions associated with the job. While this list is intended to be an accurate reflection of the current job, the Employer reserves the right to revise the functions and duties of the job or to request that additional or different tasks be performed as directed by the Employer. I understand that the responsibilities of this position may occasionally require extended hours beyond the standard 40-hour workweek, as well as flexibility in scheduling that could include different shifts or work outside typical business hours. I also understand that this job description does not constitute a contract of employment nor alter my status as an at-will employee. I have the right to terminate my employment at any time and for any reason, and the Employer has a similar right.

Employee Name: _____

Signature: _____ Date: _____

I have reviewed the job description with the employee.

Supervisor Name: _____

Signature: _____ Date: _____