

FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title : Executive Administrative Assistant Division/Department: Legal

Reporting To: General Counsel & Senior Vice President

FLSA Classification: Exempt Non-Exempt

Employment Type: Full Time Part Time Intern Contract

POSITION SUMMARY

This position provides administrative support to the General Counsel & Senior Vice President (General Counsel), as well as to other members of the Legal team and members of the Foundation for the Charlotte Jewish Community (FCJC) team (collectively the Legal/FCJC Team).

The position will support the Legal Team with organizing and filing contracts and other documents, managing processes related to acceptance of complex gifts, and governance related to the Foundation and its affiliates. This position also assists the Legal/FCJC Team with prospecting and related advancement and development activities.

A successful candidate will be a self-starter who is organized, detail-oriented, and thrives in a fast-paced environment with competing priorities. They must also be comfortable learning and helping develop new processes. A self-starter who can anticipate needs of the General Counsel and other members of the Legal/FCJC Team will do well in this role.

DUTIES & RESPONSIBILITIES

LEGAL TEAM SPECIFIC SUPPORT:

- Supports the development and implementation of processes related to acceptance of complex gifts and impact investments, as well as governance of the Foundation and its affiliates
- Assists with legal documents, including processing, execution and document retention
- In conjunction with the Legal Team, responsible for management and tracking of Foundation policies
- Provides Board support, including meeting planning and logistics and minutes and correspondence to Board members, for Community Real Property Holdings, Inc. (CPRH) and Community Investments Foundation (CIF), as well as any others that may be assigned
- Provides support for all aspects of continuing legal education programs offered by the Foundation or participated in by members of the Legal Team, either as speakers or attendees

ADVANCEMENT SUPPORT FOR LEGAL/FCJC TEAM:

- Supports development of new business by preparing PowerPoint presentations, drafting letters and proposals, and performing other business development tasks, including scheduling meetings and preparing prospecting packets
- Captures and records prospect and existing donor information in the Foundation's CRM system (currently Raiser's Edge) to help build, track and monitor prospect solicitation and cultivation
- Assists in new fund opening process and new planned gift processing for the Legal/FCJC Team

FCJC SUPPORT:

- Provides Board support, including meeting planning and logistics and minutes and correspondence to Board members, for FCJC
- Assists with the input and maintenance of data and records in the Foundation’s CRM system
- Generates monthly and quarterly financial reports in support of FCJC
- Assists with coordinating FCJC mailings and e-blasts
- Supports FCJC staff preparing for client meetings and presentations including annual philanthropic reviews (APRs)
- Supports activities related to FCJC’s annual meeting and Create Your Jewish legacy events
- Assists with the preparation and maintenance of Book of Life stories for signature by legacy donors

GENERAL ADMINISTRATIVE SUPPORT:

- Provides full administrative support to the General Counsel – including, but not limited to, scheduling appointments, filing, calendaring and preparing expense reports
- Provides general administrative and project-based support to members of the Legal/FCJC Team
- Drafts letters and assists with preparing Power Point presentations
- Provides prompt, high level customer service support to donors, clients, and professional advisors
- Responsible for developing a command of FFTC products and services offered in order to speak knowledgeably to prospects and FFTC referral network, professional advisors and others
- Serves as part of the active rotation for reception coverage, which may include staffing during opening, morning and afternoon breaks, lunches and additional coverage, as needed
- Other duties as assigned

This list of duties and responsibilities is not intended to be all-inclusive. The employee will also perform other business-related duties as assigned by the GC or other members of the Legal/FCJC Team.

JOB QUALIFICATIONS

- 3 years+ of administrative support experience; executive level experience preferred
- Experience working in a tax-exempt organization, financial institution or law firm preferred
- Advanced proficiency in Microsoft Office applications (Word, Excel, Outlook, & PowerPoint)
- Strong project management and organizational skills, detail oriented
- Responsive, service-oriented workstyle
- Ability to multi-task, adapt, work under pressure and meeting deadlines
- Strong written and verbal communication skills
- General ability to perform the essential functions and overall physical and mental requirements of this position, including stamina to perform tasks over extended periods and ability to occasionally move about to accomplish tasks or move from one worksite and/or workstation to another

POSITION SPECIFIC COMPETENCIES

Select from the following position-specific competencies. Please limit the total number of competencies to 7 or less.

All Employees: Communication & Interpersonal Skills

Executive Team: Leadership Strategic Thinking Fiscal Stewardship

All Supervisors: Delegating Responsibility & Empowering Employees Managing Employee Performance Ensures Consistent Policies & Practices

General:

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| <input type="checkbox"/> Affiliate Management | <input type="checkbox"/> Budgeting & Cost Awareness | <input type="checkbox"/> Building Organizational Commitment |
| <input type="checkbox"/> Building Team Environment | <input checked="" type="checkbox"/> Client Records | <input type="checkbox"/> Concern for Employee Satisfaction |
| <input checked="" type="checkbox"/> Customer Skills | <input checked="" type="checkbox"/> Dependability | <input type="checkbox"/> Ensures Proper Training in New Technologies |
| <input type="checkbox"/> Entrepreneurial Orientation | <input type="checkbox"/> Equipment Skills | <input type="checkbox"/> Fund Management |
| <input type="checkbox"/> Implementing New Technologies | <input checked="" type="checkbox"/> Initiative | <input type="checkbox"/> Innovative Thinking |
| <input type="checkbox"/> Job Skills | <input type="checkbox"/> Managing Meetings | <input checked="" type="checkbox"/> Managing Multiple Priorities |
| <input type="checkbox"/> Meeting Targets | <input type="checkbox"/> Presentation Skills | <input type="checkbox"/> Product Knowledge |
| <input type="checkbox"/> Productivity | <input type="checkbox"/> Project Management | <input checked="" type="checkbox"/> Quality of Work |
| <input type="checkbox"/> Relationship Building/Networking | <input type="checkbox"/> Results Oriented | <input type="checkbox"/> Technical Skills |
| <input type="checkbox"/> Time Management | <input type="checkbox"/> Training & Development | <input checked="" type="checkbox"/> Writing Skills |