

**Job Description**

**Executive Administrator**

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| **Employee:****Reports To:** | President/CEO | **Department:****FLSA Status:****Updated:** | AdministrationExemptJanuary 2022 |

**SUMMARY:** The Executive Administrator is responsible for working with the President/CEO to support and advance Sun Federal’s Mission, Vision, Values, and Culture with particular emphasis on effective communication, engagement and leadership driven relationships with credit union employees, volunteers, and members. Is the Executive Assistant to the President/CEO and performs administrative duties including producing correspondence, reports, scheduling, and follow-up while maintaining confidentiality. As directed by the President/CEO, provides administrative assistance for the Senior Team and Chairman of the Board of Directors including all volunteer governance related policies and procedures. Works closely with and manages the Administrative Assistant. Promotes and maintains the organization’s, mission, values, and culture. Works to maintain high employee engagement and is a cultural champion.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**:  *Must effectively carry out the essential duties and responsibilities of this position in a manner that consistently demonstrates Sun Federal’s mission and core values in a positive manner. Other duties may be assigned.*

1. **Provides Leadership to Administrative Team**
	1. Manages the Administrative Team. Provides direction, coaching, evaluates work and appraises performance. Ensures procedures are up to date and duties are cross-trained.
	2. Provides learning opportunities and assistance to ensure efficient and effective delivery of internal member services.
	3. Facilitates State of the Team meetings for Administrative team.
	4. Responsible for Support Center reception area and front desk coverage. Coordinates additional department support as needed.
	5. Approves payroll and expenses for administrative team.
	6. Serves as primary back-up for Administrative Assistant when necessary, including Policy Pro maintenance and changes, submitting new Sponsor Groups, processing mail, submitting facilities tickets, updating Strengths grid, etc.
2. **President/CEO and Senior Team Support:**
	1. Coordinates Senior Team, employee one-on-one, small group, and organizational wide meetings with the President/CEO.
	2. Serves as a liaison for employees and members with questions or seeking to communicate and or meet with the President/CEO.
	3. Schedules and creates annual calendars for the organization, volunteer committees and subcommittees, Wednesday Morning meetings, Senior Team meetings, Senior Team Vacation, and Link-up meetings. Prepares agendas and meeting minutes as directed by the President/CEO.
	4. Processes confidential reports and creates presentations and associated materials for the President/CEO. Ensures appropriate copies of correspondence or other documents are made, distributed, and filed for easy retrieval. Schedules and attends meetings and serves on selected committees/project teams as directed by the President/CEO.
	5. Coordinates, arranges, and manages employee and volunteer travel including conference registrations and off-sight educational sessions. Ensures and reports travel/conference related needs fall within budgets and policies.
	6. Distributes articles and newsletters as directed by the President/CEO to the Senior Team and volunteers.
3. **Board & Volunteer Network Administration**
	1. Acts as Recording Secretary for the Board of Directors and is responsible for maintaining electronic documents and the Chairman’s Book. Involved with all Volunteer related correspondence, travel, agendas, meeting preparation, expense reports, and necessary technology needs.
	2. Leads the Governance Committee, schedules meetings, develops meeting agendas and recommends updates to: Board Governance Manual, CEO Succession Plan and Advisory Board Handbook.
	3. Responsible for the distribution and virtual accessibility of the Board of Directors, Board related committees and Advisory Board meeting packets by mail and electronically.
	4. Prepares, distributes, and compiles results of the annual Board Self-Assessment and other surveys as needed.
	5. Administers and is responsible for Volunteer Website (site content, training and user profile, login requests, and security).
	6. Records and updates Volunteer Directory and historical timeline as needed (including email distribution lists).
	7. Orders flowers and/or memorial contributions for management team/volunteers and/or families as necessary.
4. **Assists President/CEO with Engagement Initiatives:**
	1. Builds and launches bi-annual Employee Engagement survey through Gallup website.
	2. Prepares correspondence for President/CEO to send to employees, runs reports, updates spreadsheets, and produces presentations for President/CEO.
5. **Provides General Support & Resources:**
	1. Approves employee and volunteer expense reports monthly. Verifies payment of corporate VISA statements in accordance with signed agreement and ensures expense reports are completed in accordance with policy and procedures. Serves as final approval for payment/reimbursement.
	2. Serves as a resource for process improvement and organizational design projects to increase efficiencies in all departments using tracking tools, automating spreadsheets, revising flowcharts, mail-merges, etc.
	3. Coordinates with Administrative Assistant and arranges monthly birthday treats for employees.
	4. Continuously updates the internal Intranet as needed.
6. **Hosting & Coordinating Meetings/Events**
	1. Develops annual budget for volunteer travel and conference.
	2. Coordinates Board, Advisory Board, and executive level meetings (includes securing venue, preparing agendas, room setup, audio/visual needs, food/beverages, air, and ground transportation, hotel accommodations, group travel itineraries, designs booklets, presentations and provides detailed budget. etc.).
	3. Creates budget and tracks expenses. Plans, coordinates ad hosts all logistics for special events, meetings and dinners including Employee & Volunteer Holiday Parties, Leadership, Management and Long-Range Planning Conferences, Employee Appreciation events, board related conferences, etc.
	4. Administers Board and Common Area rooms calendar reservations and prepares for in person and virtual meetings (including room set up, refreshments, lunches, IT/technology needs, etc.)
	5. Checks resource reservation calendars daily to ensure the conference rooms are setup and Teams unit is working properly approximately 15 minutes prior to meetings.

**Expectations for Leadership Team**

1. Supports, creates organizational awareness, and models Sun Federal’s mission, vision, values, and culture. Accepts responsibility to live Sun Federal’s culture.
2. Positively influences others by demonstrating competency in Sun Federal’s Leadership Expectations: Instilling a Shared Vision, Strategic Agility, Emotional Intelligence, Communication Skills, Business Acumen, Relationship Skills, Developing Individuals & Teams and Service Orientation.
3. Actively models Sun Federal’s service behaviors and coaches employees to consistently follow them.
4. Shows professionalism, empathy, and respect in all interactions with members, internal and external.
5. Takes personal responsibility to actively listen to the members, understand their needs and take initiative to help the member as your priority. While some have little direct member contact, every position at Sun Federal supports the member.
6. Take ownership of job duties. Offer team members assistance when necessary to help develop a fully competent and cohesive workforce. Recommends and develops process improvements and procedures to enhance productivity and improve service.
7. Responsible for the departmental budget process and department strategy sessions. Manages expenses accordingly.
8. Responsible for personal development through training, collaboration, and teamwork. Understands and adheres to all policies, procedures, and regulations. Maintains knowledge of regulations appropriate for position (i.e. Bank Secrecy Act, OFAC, etc.) and attends all training as it relates to position related regulations.
9. Adheres to Sun Federal’s security procedures and safeguards member information.
10. Demonstrates professionalism in dress, tone, flexibility, and communication.
11. Consistently acts as part of a cohesive team, demonstrating excellent interpersonal skills and the ability to interact positively with other employees. Maintains open and respectful communication with other departments. Handles conflict directly and discreetly.
12. Collaborate, contribute, and communicate for the success of the team. Invite and accept feedback from others and provide upward feedback.

**PERFORMANCE MEASUREMENTS**

1. Department functions are effectively and efficiently completed in accordance with established Credit Union policies, procedures, standards, and related program and legal requirements.
2. Department personnel are well trained, effective, and efficiently utilized.
3. Professional business relationships exist with vendor partners. Questions and problems are promptly and courteously resolved.
4. Effective working relations and coordination exist with Volunteers, Senior Team, and CU Staff. Support is provided as required.
5. The Credit Union's professional reputation is conveyed and maintained in all interactions.
6. President/CEO is appropriately informed of area activities and of any significant concerns.

**QUALIFICATION REQUIREMENTS**

*To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of knowledge, skill and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. The individual must be able to successfully pass background checks.*

**Education/Certification:** Bachelor’s degree in business management required; Organizational Development or Human Resources degrees considered.

**Required Knowledge:** Thorough knowledge of Sun Federal’s Board Governance Manual, Succession Plan, Bylaws and Business Plan process; and NCUA’s Chapter 14 Federal Credit Union General Provisions.

**Experience Required:** Three to five years of related executive-level support and strategic organization experience.

**Skills/Abilities:** Significant level of diplomacy and trust. Strong interpersonal, leadership, and supervisory skills. Strong member service skills. Able to maintain confidentiality. Displays professional leadership qualities and an image that promotes Sun Federal’s brand and culture. Excellent organizational, planning, time management and critical thinking skills. Able to coordinate well with other departments and personnel. Ability to work well under pressure. Professional appearance and attitude. Excellent presentation and communications skills. Self-directed and able to work with minimal supervision. Strong organizational abilities. Ability to operate related computer applications and other business equipment. Able to navigate multiple systems and use all related software applications. Ability to prepare and analyze reports using Microsoft Excel. Ability to handle planned or unplanned situations in a proactive, highly engaging manner.

**PHYSICAL ACTIVITIES AND REQUIREMENTS**

**Talking:** Especially where one must frequently convey detailed or important instructions or ideas accurately, loudly, or quickly.

**Average Hearing:** Able to hear average or normal conversations and receive ordinary information.

**Repetitive Motion:** Movements frequently and regularly required using the wrists, hands, and/or fingers.

**Average Visual Abilities:** Average, ordinary, visual acuity necessary to prepare or inspect documents or products or operate machinery.

**Physical Strength:** Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally.

**WORKING CONDITIONS:** No hazardous or significantly unpleasant conditions (such as in a typical office).

**MENTAL ACTIVITIES AND REQUIREMENTS**

**Reasoning Ability:** Ability to apply logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions. Able to interpret a variety of technical instructions and can deal with multiple variables.

**Mathematics Ability:** Ability to compute ratio and proportion and percentage. Able to perform very simple algebra.

**Language Ability:** Ability to read periodicals, journals, manuals, dictionaries, and thesauruses. Ability to prepare business letters, proposals, summaries, and reports using prescribed format and conforming to all rules of punctuation, grammar, diction, and style. Ability to conduct training, communicate at panel discussions and make professional presentations.

**JOB DESCRIPTION INTENT & PURPOSE**

*Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed job descriptions are an integral part of any effective compensation system.*

*All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all inclusive. Additional functions and requirements may be assigned by managers as deemed appropriate.*

*In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.*

*Job descriptions are not intended as and do not create employment contracts. Sun Federal maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.*

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Employee Signature Date

**This Job Description is not a complete statement of all duties and responsibilities comprising this position.**