



COMMUNITY FIRST FUND TEAM MEMBER PROFILE

Date: 07/2021

Name: Vacant

Position/Title: Administrative Associate - Philadelphia

Department: Executive Reports To: Vice President, Philadelphia Sales Leader

Salary Band: Core Operations

CHARACTERISTICS

- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Adaptable
- Ethical
- Goal Oriented
- Friendly
- Personable
- Conscientious
- Self-starter
- Self-awareness
- Learning mindset
- Performs well in a fast paced work environment
- Supportive
- Curious
- Creative
- Positive

SKILLS

- Proficiency in Microsoft Products; with advanced skills in Word & Outlook and strong skills in Excel and PowerPoint.
- Data entry.
- Customer service in-person and on the phone.
- The ability to maintain a high degree of accuracy and attention to detail.
- Ability to work independently.
- Strong written and verbal communication skills.
- Strong analytical skills.
- Ability to work effectively with racially and socially diverse individuals.
- Bilingual (English/Spanish) required.

EXPERIENCE

- 2 – 4 years of experience in general administrative duties; advanced skills preferred
 - 2 – 4 years of experience in customer service
 - Financial experience preferred.
 - Associates degree in business or related field or equivalent experience
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ROLE:

The Administrative Assistant is the primary administrative assistant for the Philadelphia Office. The duties also include answering the main phone lines, ensuring guest and clients visiting the office are provided quality customer service, sorting and distributing mail from the post office, coordinating department meetings, and assistance with reporting as directed. Support the Vice President, Philadelphia Sales Leader with coordination of calendar and scheduling, preparing and coordinating materials for internal and external meetings, and processing intake data for client visits. Support other departments as assigned.

RESPONSIBILITIES:

1. Office and File Management
2. Customer Service and Assistance
3. Administrative Support to the Philadelphia Office
4. Individual, Team and Company Participation

EXPECTATIONS:

1. Office Management

- a. Daily security of building: check on lights, meeting room supplies, and welcome signs.
- b. Ensure main office is maintained with regard to general office upkeep; organize magazines and newspapers in the lobby areas; manage the soda, water, coffee, and snacks.
- c. Ensure promotional flyers, newsletters, annual reports are maintained.
- d. Ensure office supply inventory is up to date and stored in appropriate office locations.
- e. Distribute mail and other documents daily.
- f. Coordinate planning and logistics for Philadelphia office events that require catering or reservations.
- g. Support bulk and special mailings.
- h. Manage vendors servicing the office and equipment as directed.
- i. Prepare presentation packets as instructed to take to offsite meetings.

2. Customer Service and Assistance

- a. Answer all incoming phone calls, screen and transfer calls to the appropriate staff. Take clear and accurate messages.
- b. Greet and accommodate visitors to the office.
- c. Prepare meeting rooms for external guests and customers.
- d. Assist with special programs, as directed.
- e. Assist with reporting and data collection as directed.

3. Administrative Support to the Philadelphia Office

- a. Assist in the preparation of stakeholder meetings.
- b. Make copies as requested, and including grants, reporting materials, articles, and other documents as directed.
- c. Maintain filing systems as directed.



- d. Support executive and management level staff as directed

4. Individual, Team & Company Participation

- a. Quarterly Coaching Sessions and Annual Review Meeting
- b. Department Meetings
- c. Opportunities Meeting, Quarterly Business Meeting
- d. Participate in training, assessments and surveys as directed
- e. Special Events Attendance & Support

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.
- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a wide geographic area is required approximately 20% of the time. Employee must have transportation in order to travel outside of the office for meetings, conferences, client visits and other job-related commitments.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. The team member profile does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.