

# Office Assistant

## Position Description



YOUR GROWTH. OUR PASSION.

### Summary

The Office Assistant exudes a professional, confident demeanor and is a team player. This position provides direct support to EDWC's Executive Director. Secondary support to Business Services Consultant, Senior Director of Business Finance, and the organization's work as a top-performing economic development consulting practice. In so doing, the successful candidate weaves "wow" into the customer experience and EDWC's unbeatable platform for business growth.

### Reporting

This position reports to the Executive Director.

### Responsibilities

1. **Administrative Support.** Identify, prioritize, and execute on multiple administrative support needs, activities, and projects with minimal direction. Support the Executive Director and optimize use of his time, including calendaring, aligning time and tasks for successful completion, prepping for meetings, and ensuring the schedule runs smoothly. Provide clerical support to Board of Directors' activities. Assist executive director with tracking accounts receivable and payable, preparing invoices and deposits for the bookkeeper's electronic processing. Create and send quarterly subscription reports to local municipalities. Ensure the back office operates smoothly.
2. **Loan and Incentive Program Assistance.** Expedite and support delivery of loan packages to committee members. Upload signed loan closing documents to our cloud storage system to share with the borrower. Support the Business Services Consultant with loan servicing; contacting borrowers for quarterly/annual documentation, tracking missing documents, updating tracking spreadsheet and managing ticklers for required loan filings and security documentation. Assist in the scheduling of annual borrower site visits. Support program staff as necessary.
3. **CRM Maintenance.** Ensure EDWC's Customer Resource Management System (CRM) is accurate and current. Research and update contacts by various methods. Support marketing by creating specific target lists for email campaigns. Inputting customer business cards from the team into the system. Modify and set up forms and workflows.
4. **Performance Reporting.** Assist with the gathering of data for and calculation of various organizational performance measures, including customer satisfaction, value creation, financial, mission and other scorecard metrics. Build reports for monthly meetings.
5. **General.** Assist the EDWC team with day-to-day activities, supporting hosted events and workshops, coordinating meetings, preparing meeting packets, compiling meeting minutes, gatekeeping, answering phone calls, ordering supplies, maintaining databases, and managing documents. Complete other duties as assigned.

### Desired Qualifications

The ideal candidate has demonstrated experience in prioritizing to what matters and contributing to teams in ways that are self-guided, solutions-oriented, collaborative, openly communicative, and accountable. Equivalent combination of degree, training, and experience (minimum 2 – 4 years, not necessarily contiguous) in a field supportive of the responsibilities of this position. Managing competing demands, working efficiently with minimal guidance, and doing what it takes within a small team. Successful track-record of building valued and trusted relationships within corporate environments is essential.

## Core Abilities

- **Follow-Up:** dependable; meets deadlines and effectively completes responsibilities; consistently translates tasks into meaningful results on time; assimilates feedback; requires minimal supervision; keen sense for sequencing; can attend to a broader range of activities.
- **Customer Centric:** dedicated to meeting the expectations of internal and external customers; gathers customer feedback to enhance EDWC's work; consistently acts with the customer in mind and builds effective relationships marked by trust and respect.
- **Teamwork:** participates in team activities; builds morale and spirit; shares wins; regularly uplifts other members of the team externally; speaks in "we" not "I;" identifies with the team; engenders a feeling of belonging among the team.
- **Technology:** demonstrates proficiency in Microsoft Office applications, Adobe software, research databases, willingness to learn customer resource management applications like Apptivo.

## Other Advantageous Knowledge & Skills

- Confidentiality
- Communication (Written and Verbal)
- Problem Solving

## Work Schedule & Travel Expectations

The work schedule is defined by the duties of the position and outlined by the Executive Director. Some flexibility in work scheduling is required; occasional early morning and evening meetings may be necessary. Normal business hours are 8am-5pm Monday thru Friday; however, flex time and remote work are earnable and regularly utilized opportunities among EDWC team members. Limited travel is required.

## Pay and Benefits

- **Pay** – Minimum \$43K (full-time base rate, part-time pro-rated) plus a premium added to base reflecting your experience and a "gain-share" / performance-based bonus opportunity.
- **Health and Wellness** – Robust benefits and wellness package including but not limited to medical, dental and vision. Choose among multiple health plan options tailored to you. Life Insurance, Short Term and Long-Term disability offered. Employee assistance services & work-life perks also included.
- **Retirement** – SIMPLE IRA with 1:1 match of contributions up to 3%.
- **Vacation** – 3-weeks PAID time off each calendar year and generous paid holidays.
- **Work / Life Integration** – From family time off to flexible "in hours" to volunteering, we work with employees in meeting personal and family goals.
- **Professional Development** – Quarterly feedback system required for career health plus pay for training needed to succeed with us.

### **HOW TO APPLY:**

- Email a cover letter and resume in PDF format to [careers@edwc.org](mailto:careers@edwc.org) with the subject line "Office Assistant Opportunity"
- Applications will be accepted until position is filled.
- Learn about us at our website [www.edwc.org](http://www.edwc.org)
- Questions? Glad to help. Reach out to Sarah Stern, Business Services Consultant, at 262-335-5769 or at the email address above.
- Selection process (for invited candidates) will additionally include a writing sample, online survey, interviews and background check.

## Notices

EDWC is an equal opportunity employer. A background check is conducted for all prospective employees. All employees must respect and adhere to strict confidentiality policies for handling both organizational and customer information. All employees are at-will.