



# TalentRise

POSITION PROFILE

## **Executive Assistant to the President/CEO**

**United Way of Greater Rochester  
and the Finger Lakes**

May 2024

**TalentRise, Inc.**  
**An Aleron Company**  
talentrise.com



**United Way  
of Greater Rochester  
and the Finger Lakes**

## About United Way of Greater Rochester and the Finger Lakes

United Way of Greater Rochester and the Finger Lakes mission is to mobilize the goodwill and resources of our community so that everyone can thrive. Our footprint encompasses 5,144 square miles of rural, suburban, and urban neighborhoods, and brings together more than 50,000 donors, 13,000 volunteers, 800 workplaces, and hundreds of nonprofit partners to address the region's biggest challenges.



United Way brings together local people, companies, nonprofits, and leaders in collective giving to build a thriving community for all. Investments in United Way's Community Impact Fund provide the essential building blocks of opportunity – youth opportunity, financial security, healthy community, and community resiliency – for thousands of people throughout the region.



Our core values define who we are and how we serve our community together. United Way and our team members embrace **Integrity, Action, Caring, and Teamwork**. United Way strives to ensure employees and external partners feel valued, connected, and empowered.

Learn more at [www.unitedwayrocflx.org](http://www.unitedwayrocflx.org).

## Opportunity Summary

The Executive Assistant to the President plays a critical role in the overall effective functioning of the organization. Working independently in a fast-paced environment with changing priorities, this position performs a broad range of complex and varied executive administrative and organizational duties.

This position serves as the primary point of contact for internal and external constituencies on all matters of the Office of the President. The Executive Assistant to the President works closely with the President & CEO, Board of Directors, Executive Leadership Team, and leaders throughout the organization. This position represents the President & CEO and United Way at all times and provides exemplary service to all constituents.

The ideal candidate is service-minded, highly organized, detail-oriented, problem-solver, strong communicator, anticipator of needs, and serve as the “air traffic controller” to provide clarity and coordination in a hub of activity. This person thrives in a fast-paced environment and loves to create and manage systems and workflow with an eye for continues improvement.

## Essential Functions

- Successfully runs and operates the President’s Office smoothly and efficiently. Supports the President & CEO in a wide variety of administrative tasks and responsibilities.
- Proactively and independently manages President’s calendar: Has full discretion to schedule all external and internal meetings (virtual and in-person) to align with organizational priorities, conference calls, out-of-town trips, and speaking engagements. Provide daily/weekly calendars of all meetings and updates and provide reminders.
- Makes all arrangements for meetings, conferences, trips, and speaking engagements; assemble detailed itineraries or agendas, and, when required, packets of materials or background information for the President to review in advance.
- For donor meetings, prepare informational packets and donor background material in consultation with Resource Development team; draft digital contact record and provide reminders for follow-up.
- Serves as the liaison between the President and employees and the President and external stakeholders and partners. Effectively communicates, filters and analyzes information.
- Represents the President’s Office and United Way in a positive, professional manner internally and externally, with a strong focus on customer service and responsiveness.
- Understands business priorities to effectively play "gatekeeper" and "gateway" role, helping prioritize access to the President and creatively managing the meeting calendar as needed.
- Prioritizes conflicting needs; handles matters expeditiously, and follows-through on projects to successful completion, often with deadline pressures.
- Works closely and effectively with the leader to keep them well informed of upcoming commitments and responsibilities, following up appropriately.
- Strong logistics background with planning skills to conduct office procedures, plan events, anticipate resources, and execute projects on-time.
- Leads all support and management for the Board of Directors, including draft agendas, meeting materials, management of Board Portal, minutes and formal records.



- Composes routine and non-routine correspondence. Prepares letters, memos and other documents. Compiles and organizes data for special reports. Transcribes and distributes meeting minutes and follows through with action items and tasks where applicable.
- Responsible for submitting expense reports, timecards, and payment vouchers as needed.
- Engages in cross department work and ad hoc committees.
- Creates content and presentations in different programs including Word, PowerPoint, BoardEffect, and other software programs as required.
- Maintains professional and technical knowledge to remain operationally proficient and productive.
- May provide functional and/or technical direction to other support staff.
- Consistently demonstrates the values and mission of United Way.
- Performs other duties as assigned.

## Skills and Competencies

- Ability to proactively learn and anticipate the needs of the business and President & CEO to protect and maximize the President's time and priorities.
- This is the highest-level position in the executive administrative support job series responsible for providing complex assistance to the CEO & President, Board of Directors, and other entity committees. The work requires frequent use of tact, discretion, independent judgment, knowledge of the organization's activities and the ability to conduct independent projects.
- Keen awareness of patterns and trends, serving as a dot connector
- Demonstrate broad understanding of organization functions to support the complex nature, scope, and diversity of role responsibilities
- Ability to make decisions with high judgment skills
- Critical thinker, analytical aptitude, problem solver
- Interpersonal skills and the ability to build relationships with stakeholders, including staff, company executives, peers, and external partners.
- Proven ability to handle confidential information with tact and discretion, be adaptable to various competing demands, and demonstrate the highest level of customer/client service and response.
- Physically present in the Rochester office ensuring the smooth operation and as resource to the organization, with flexibility for remote work pending office needs.
- Adept in learning technology and systems:
  - Expert level in Microsoft Office programs: PowerPoint, Excel, Word, and Outlook
  - Experience in Team and Project Software: Teams, Asana and Slack preferred
  - Experience with BoardEffect or online committee/board platforms preferred



- Adept at creating standard operating procedures
- Project management skills with the ability to follow through on tasks and projects
- Excellent verbal and written communication skills
- Strong comprehension skills
- Proven ability to handle confidential information with tact and discretion, be adaptable to various competing demands, and demonstrate the highest level of customer/client service and response
- Physically present in the Rochester office ensuring the smooth operation and as resource to the organization, with flexibility for remote work pending office needs.

## Education and Experience

- Associates' degree required; Bachelor's degree preferred.
- At least 8 years of experience in an executive assistant, administrative or office management role supporting C-level executives required; or equivalent combination of education and experience required.



## Compensation and Benefits

United Way employees enjoy a competitive compensation and benefits package including paid time off, health insurance options with a generous employer contribution, retirement benefits with above standard employer contribution, flexible work schedules, team events, and internal committees for connection opportunities and fun!

- A salary range of \$65,000-75,000
- A benefits package that includes health, dental, and vision insurance, a 403(b)-retirement plan, life insurance, a flexible spending account, and health savings account.
- General paid time off with 14 paid holidays a year (thirteen days off and two half days) and your birthday off; two personal days, two volunteer days, 12 sick days, and three weeks of vacation per year, all prorated in your first year of employment
- Paid professional development
- Opportunities to give back to the community in life-changing ways

### Reports to President & CEO

**Supervisory Responsibilities:** None

**Travel:** Some rare evening travel may be required with attendance at events

**FLSA Classification:** Exempt

## Join the Team!

The United Way of Greater Rochester and the Finger Lakes is a dynamic and collaborative work environment comprised of more than 90 talented professionals who are dedicated to doing meaningful work in the community.

We are committed to creating a welcoming environment that embraces, values, respects, and encourages people to show up as their authentic selves to produce their best work. Together we can ensure that processes, policies, and practices foster fairness, belonging, and equity that reflect the views and values of all people within all levels of our organization.

We're looking for people who are self-starters; excel in a collaborative team environment; have a passion for making a difference; and are natural relationship builders with proven success in making lasting connections. Join our team and make an impact serving our region.

## More Information

For additional information about this opportunity and to apply, please submit a resume, cover letter, and short writing sample to:

Peter Petrella  
Practice Leader  
TalentRise  
petrellap@talentrise.com  
m: 716.860.4485

Adam Nye  
Executive Recruitment Consultant  
TalentRise  
nyea@talentrise.com  
m: 724.714.1530

In support of the ADA, this job description lists only the responsibilities and qualifications deemed essential to the position. Reasonable accommodations may be provided to enable individuals with disabilities to perform the essential functions. United Way of Greater Rochester and the Finger Lakes is an Equal Opportunity Employer. This policy prohibits discrimination based on sex, race, color, religion, creed, national origin, age, marital status, sexual orientation, gender expression, disability, genetic predisposition, veteran status, or status as a member of any other protected group or activity.

