

Job Posting:

Position: Executive Specialist (P/T)

Overview:

The Executive Specialist is a virtual, part-time (25 hours/week) position supporting the CEO, Managing Director of Advancement, and the Advancement Department. The role focuses on advancing the organization's mission by supporting executive administration, donor stewardship, event coordination, and data management. Key qualities include proactivity, attention to detail, proficiency in Microsoft Outlook and Office Suite, and familiarity with Salesforce.

Key Responsibilities:

- **Executive Administration (30%):** manages the CEO's schedule, inbox, and travel, drafts and proofreads correspondence and develops meeting preparation materials, coordinates major scheduling with internal and external constituents
- **Donor Stewardship & Cultivation (25%):** Supports the Advancement Team's donor cultivation and stewardship strategies, including drafting fundraising-related correspondence and communications (outreach emails, grant proposals/reports, thank you letters, etc.), tracks [moves management](#) for the CEO and Managing Director, and researches prospective donors and partners.
- **Event & Meeting Coordination (25%):** Coordinates scheduling and logistics for internal and external meetings (board meetings, staff retreats, CEO speaking engagements, etc.) and supports the planning and execution of member and donor stewardship and cultivation events.
- **Database Management & Reporting (15%):** Logs relevant member and donor outreach in Salesforce and helps maintain accurate and Salesforce records, generates reports and lists from Salesforce, and analyzes fundraising data and dashboards.
- **Equity Learning (5%):** Participates in skill building and professional development to integrate into the role.

Qualifications:

- Associate's degree and 3-5 years of relevant experience (executive assistance, development support, project management, etc.)
- Strong skills in Microsoft Office (Teams, Word, PowerPoint, Excel) and familiarity with Salesforce.

This role requires a detail-oriented, proactive candidate with excellent relationship management and technology skills.

Full Job Description:

TITLE: Executive Specialist

Position Overview:

The Executive Specialist is a virtual, part-time role (25 hours/week) that reports to the Chief Executive Officer. This role supports the CEO, Managing Director of Advancement, and the Advancement Department (primarily the development team) to further the organization's mission: ***"To amplify and increase the impact of lean funders by building an inclusive community where they can learn, connect, and collaborate."*** The successful Executive Specialist is proactive, detail-oriented, skilled in relationship management, and experienced in the use of Salesforce and other platforms.

RESPONSIBILITIES include:

Executive Administration Support (30%):

- Produces correspondence, handbooks, meeting reports, and plans in partnership with the CEO
- Provides a diplomatic voice for the CEO's office when interacting with members, board members, supporters, partners, staff members, senior executives, and the community. Assures that all incoming requests receive a personal reply or are directed to the proper individuals.

- Inbox and file management; proof reading; and maintains files for CEO and board records
- Participates in senior leadership, major committee, and board meetings to take minutes, coordinate agendas, and track follow-up items
- Support advancement in various tasks for fundraising campaigns, mailings, and special projects as needed

Donor Stewardship & Cultivation (25%):

- Support the design and implementation of donor cultivation, stewardship strategies, and proactively drive and track moves management activities for the Managing Director and CEOs portfolios.
- Prepare information profiles in advance of donor and prospect meetings for the CEO and Managing Director
- Research prospective donors and grant opportunities
- Assist in creating donor communications, including drafting:
 - grant proposals and reports
 - mid-year and end-of-year impact reports
 - personalized thank you letters for gifts over \$5,000
 - personalized outreach, meeting requests, and timeline follow-ups
 - event invitations

Event, Meeting, and Program Scheduling for Internal/External Parties (25%):

- Works with the CEO and Managing Director of Operations & People on planning and hosting for All Team meetings
- Manages complex, extremely active calendars, identifying potential conflicts and making the most effective use of the CEO and Managing Director of Advancement's time.
- Support the planning and execution of in-person donor stewardship cultivation events, including Regional Gatherings, the Champions' Reception, and relevant activities at the Annual Conference (no travel required). Help with logistics (like name tags, catering, lunch/dinner reservations, etc.) by coordinating with the Managing Director of Advancement.
- Prioritizes conflicting needs, handling matters expeditiously and proactively, and follows through on projects to successful completion, often with deadline pressures. Proactively communicates with time-sensitive projects.
- Participates and assists in scheduling board, executive committee, governance committee, and other board committee meetings; manages logistics, including arrangements of facilities, catering, A/V support, etc.

Travel Arrangements, Database Management, and Reporting (15%):

- Assists in scheduling staff events (location, catering, etc.)
- Assists CEO and Managing Director of Advancement with frequent travel arrangements and expense reporting
- Maintain accurate and up-to-date donor records and fundraising-related dashboards in Salesforce
- Generate reports and analyze fundraising data to identify trends and opportunities
- Stay informed on best practices for utilizing Salesforce to efficiently and effectively track and report on moves management efforts

Equity Learning and Skill Development (5%)

- Participate actively in staff learning and training activities related to diversity, equity, and inclusion
- Identify, pursue, and recommend opportunities to apply learnings to role and organization

Qualifications

The ideal candidate will possess proven experience, be committed to continuous learning, and be motivated to take on challenges. The qualifications below have been identified:

- Associate's degree
- 3-5 years of experience in executive assistant, development support, project management, and/or an equivalent combination of education and experience
- Excellent technology skills including Microsoft Teams, Microsoft Word, PowerPoint, and Excel with an ability to quickly learn new software and adopt new technologies. Experience with Salesforce is a plus.

Organization Overview:

Exponent Philanthropy is the largest philanthropic network in the country and the only membership association that specifically focuses on foundations, families, companies, and individuals who practice philanthropy with lean operations. With more than 1,500 members representing every corner of the U.S., we are a nationwide network of community-connected philanthropy leaders. Since our founding nearly 30 years ago, our work has focused on amplifying and increasing the impact of lean funders and transforming communities through informed giving. We do this by fostering a vibrant philanthropic

network, gathering and sharing innovative and promising philanthropic practices, conducting robust field-wide research, and producing dozens of valuable programs, publications, and resources each year to help funders – regardless of their size or structure – make informed decisions, maximize their impact, and effectively serve their communities.

We seek bright, highly collaborative, ethical, intellectually curious colleagues enthusiastic about connecting and serving our members. Our staff members are passionate about [our mission and core values](#) and believe strongly in the power of philanthropy to transform communities. Our team members have an entrepreneurial spirit, strong problem-solving skills, and actively collaborate to achieve individual and shared goals. Our members come from all walks of life and so do we. We are proud to hire great people from a variety of backgrounds because we believe it makes our organization stronger. If you share our values and our enthusiasm, you will find a home at Exponent Philanthropy.