**District Executive Assistant**



**Rotary District 5400**

**POSITION FILLED 2021-2022**

**Duties and Responsibilities**

**Updated: May 2021**

Term: Independent Contractor Status Contract

Terms: Year-to-Year based upon performance

Compensation Range: $900 - $1100 per month

Applicant Instructions: Interested candidates may submit their resume and cover letter to any person in the District Governor line (Sitting DG, DG Elect, DG Nominee)

The District 5400 Executive Assistant will answer directly to the sitting District Governor and will be responsible for administrative duties as specifically assigned by the District Governor, and the maintenance of the D5400 permanent (virtual) office. The District Governor Elect, subject to ratification by the District Leadership Council, shall appoint the Executive Assistant for the Rotary year. The appointment shall be made in writing setting forth the compensation and such other terms and conditions as the District Governor Elect and the District Leadership Council may believe appropriate.

**Required Qualifications**

• Excellent written and oral communications skills

• Strong organizational skills, including the ability to plan and ensure plan elements are successfully achieved.

• Knowledge of basic business record management including accounting, filing, minutes and general business files

• Proficient in required and specific computer skills

**Desired Qualifications**

• Experience in volunteer leadership

• Experience in working for volunteer team(s)

• Knowledge of Rotary

• Knowledge of the District 5400, including the District Leadership Plan

• Proficient with Quickbooks Online, Google Documents, Microsoft Suite of products to include Excel

**Duties & Responsibilities**

• Serves as an ad hoc member of the District Leadership council without vote.

• Assist the District Governor with the following activities:

a) Advising the District Governor Elect as to the preparation of the District Budget, the tasks necessary to calendar for the Rotary Year including District and Rotary International deadlines for appointments, notifications and reports.

b) Maintaining expense records of the District Governor and timely preparation of forms for RI accounting and reimbursement of funds, ensuring reports are available for monthly District Leadership meetings, and upon request by the sitting District Governor.

c) Filing required reports as designated by the sitting District Governor to RI

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d) Document all purchases with proper invoice copies. Verify that all purchases are incurred by authorized officers of the District and that said purchases are within the approved annual budget designated for those purchases. Obtain approvals of District Chair and DG for all items purchased or reimbursed. Issue all payments correctly and timely.

e) Obtain and archive proper documentation from any District 5400 member or vendor who requests reimbursement. Obtain approvals of District Chair and DG for all items purchased or reimbursed. Issue all payments correctly and timely.

f) Prepare and send bi-yearly invoices for District dues to Club Treasurers throughout the District and collect and deposit the funds in the District’s bank account.

g) Assist DG, DGE, and Committee Chairs with reports and provide reconciliation of program(s) and committee operating income and expenses. Examples of such programs would be PETS, RYLA, Rotary Youth Exchange, District Foundation, Fund Raising Efforts (EG: District Raffle), District Conference, etc. Ensure that payments are received, posted, deposited, and recorded properly and that invoices are sent out semi-monthly. Follow up when necessary.

h) Complete the District’s bookkeeping transactions software by the 10th of each month for the prior month, and the District’s year-end bookkeeping within the defined time frame to meet District and RI expectations.

i) Manage the District’s Accounts Receivable to keep it current. Work to collect all past due accounts. Provide a report to the DG chain monthly along with a progress report on overdue accounts.

j) Attend meetings of the DLC, DLT, and/or other meetings as requested by the Sitting District Governor.

• Assist the District Treasurer with the following activities:

a) Maintaining District financial records, following accounting standards and separation of duty protocols

b) Preparing monthly financial statements and such other financial reports as may be required.

c) Preparing the annual budget.

d) Such other duties as the District Treasurer may choose to delegate as approved by the Sitting District Governor.

• Carry out such other duties as may be assigned and/or approved by the sitting District Governor.

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**Evaluation**

Annually the District Governor will prepare a written performance evaluation in consultation with the other District Leadership for whom the Executive Assistant has worked and review it with the District Leadership Council and with the Executive Assistant.

The criteria for evaluation shall be based upon the responsibilities assigned to the Executive Assistant and may include, yet not limited to, the following:

1. Were the District Governor's expense records properly maintained and were all reports filed with RI on a satisfactory and timely basis.

2. Were RI reports completed and filed on a timely basis.

3. Were the financial records maintained appropriately, timely and accurately.

4. Were financial statements issued on a timely and accurate basis including any request for special financial information.

5. Was the budget prepared on a timely basis.

6. Were the official district records maintained on an accurate and timely basis.

7. Were any other duties assigned carried out appropriately, accurately and timely.

8. Was the business of the District or the Clubs hindered by the performance of the EA.

9. Was the EA responsive to the Sitting District Governor requests related to the job performance and agreed upon expectations.

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