

## **Job Spec for Personal Assistant & General Administrator (Fiduciary Institute of Southern Africa)**

### **Position Overview:**

The Personal Assistant (PA) & General Administrator supports the operational and administrative functions of the Fiduciary Institute of Southern Africa (known as FISA) as the leading professional fiduciary industry body within South Africa. This role will focus on supporting the CEO and council members as part of FISA. The role, will amongst others, focus on organizing events, managing memberships, overseeing queries, coordinating council activities, overseeing CPD processes, managing travel arrangements, consulting with relevant stakeholders like the Masters Office, and keeping meticulous records and processing of data related matters.

The successful candidate will manage administrative tasks, coordinate events, maintain key processes, and ensure seamless organizational functioning. The ideal incumbent /candidate will possess strong organizational, interpersonal, and multitasking skills, with a deep understanding of the many aspects involved in providing personal assistance and administrative support to senior leaders. They will be required to have well developed communication skills and be able to engage comfortably with industry leaders. This is a fulltime role, working from home with working hours of 40 hours per week.

### **Key Duties & Responsibilities:**

**1) Events Management** - Plan, organize, and execute industry events such as conferences, training sessions, seminars, and workshops. Coordinate event coordination, including venue bookings, preparing event budgets, managing expenses effectively, arranging catering, audio-visual setup, and attendee communication. Maintain an annual calendar of events, communicate with attendees, and ensuring deadlines for registrations are met. It would also include collaborating with vendors, speakers, and sponsors to ensure an effective and efficient event execution.

### **2) Membership of the Industry Body (FISA)**

As part of managing membership for the Fiduciary Institute of Southern Africa (FISA), this role ensures the seamless administration and growth of the member base. Key responsibilities include maintaining an up-to-date and accurate database of all members and their status, enabling efficient tracking and reporting. The role handles membership renewals, registrations, and cancellations with precision, ensuring a smooth experience for all members. Additionally, the role supports new member onboarding by sending welcome materials, processing applications, and fostering a positive initial interaction with FISA. Regularly preparing detailed membership reports and provides critical insights for management decision-making. The role will involve

collaborating closely with the marketing team, in promoting the benefits of membership to potential members, strengthening FISA's reputation and expanding its professional community.

**3) CPD (Continuing Professional Development) Process Management-** This responsibility includes liaising with the CEO of FISA on the CPD points available to members at each of the events held throughout the year. This is on a quarterly basis across all six (6) regions in South Africa. This is important in ensuring that members can plan and organise themselves to remain compliant with industry standards. The incumbent will serve as the primary point of contact for all CPD-related inquiries from members ensuring members receive clear guidance and support.

**4) Managing Membership Queries –** Respond promptly to queries regarding membership benefits, requirements, or issues that members of FISA may have. The incumbent will liaise with other departments or external parties to resolve complex queries as needed. They will provide guidance on how to access member-exclusive resources and tools and ensure that members receive consistent and professional communication.

**5) Coordinate Council Meetings and Sub-Council Meetings-** Schedule and organize, for five or more council meetings per annum. The successful incumbent will record and distribute minutes of meetings to relevant stakeholders. They shall coordinate logistics for Annual General Meetings (AGM) and pre-AGM conferences.

**6) Travel & Accommodation Arrangements -** Managing travel and accommodation arrangements involves coordinating seamless travel experiences for the CEO, councillors, and guest speakers on request. Responsibilities include booking travel and accommodation tailored to their schedules and requirements while ensuring quality and efficiency. It will include developing detailed itineraries to ensure smooth transitions and clear guidance for travellers. Additionally, the role may include negotiating with travel and accommodation providers to secure cost-effective options that align with budget constraints within FISA. Accurate management of travel-related expenses and meticulous record-keeping are essential for financial accountability and efficient reporting.

**7) Masters Office Issues -** Manage the process of sending issues logged by members on the facility on the FISA website to the Office of the Chief Master on a weekly basis.

**8) Keeping Records & Processing Data –** The role will require the maintenance of accurate and organized records of all FISA data, including member information, council decisions, and event details. The incumbent will be required to process and update data in line with industry compliance and privacy standards, ensuring digital and physical filing systems are secure and up to date. They will be required to prepare periodic reports and presentations for the CEO when required.

**Qualifications:**

- Education: Minimum of a high school diploma (Matric) or equivalent qualification.
- Preferred Qualifications: Certificate or diploma in office administration, business administration, or secretarial studies. Diploma or degree in Business Administration, Event Management, or related field.

**Experience:**

- At least 5-7+ years of experience in a similar administrative role, preferably in the fiduciary or financial services industry supporting senior executives.
- Familiarity with the Fiduciary sector and related legal frameworks in South Africa is advantageous.
- Proven history of partnering with senior leaders in a supportive and assistant role.
- Proficiency in Office Tools - Advanced skills in Microsoft Office Suite (Excel, Word, PowerPoint, Outlook).
- Familiarity with CRM systems or database management tools.
- Travel Management Tools - Knowledge of travel booking platforms or systems for arranging travel and accommodation.
- Event Management - Experience with tools for organizing and coordinating events, such as project management or scheduling software (working experience of Cvent will be an advantage).

**Skills and Competencies Required:**

- Strong Organizational Skills: Ability to manage multiple tasks and prioritize effectively.
- Excellent people skills: Proven ability to build rapport and strong relationships with internal and external stakeholders. This would include both verbal and written skills to engage with members, stakeholders, and vendors.
- Attention to Detail: Ensure accuracy in records, reports, and event planning.
- Problem-Solving: Ability to address member concerns and logistical challenges efficiently, as well as dealing with problems/challenges when they arise.
- Organizational Skills-Strong planning and time management abilities to juggle multiple responsibilities.
- Critical Thinking Skills-Resourcefulness and initiative in addressing administrative and logistical challenges.
- Personal Attributes:
  - Self-Motivation - A self-starter who takes initiative with minimal supervision.
  - Work Ethic - High level of professionalism, discretion, and confidentiality.

- Flexibility - Willingness to travel occasionally and adapt to dynamic priorities.