



SV BRANCHES, INC.

Virtual Assistants For Your Personal
and Professional Life

ROOTED SCHOOL INDY CASE STUDY

SV Branches does the heavy lifting so that Rooted School Indy can focus their attention on the work that needs to be done to ensure their students are equipped to succeed in their post- secondary plans.



AT A GLANCE

MISSION

Rooted School Indy exists to provide students personal pathways to financial freedom.

VALUES

Rooted School Indy:

- Pushes to grow at all times.
- Aims to be prepared.
- Puts people first.
- Pushes the limits of what's possible.
- Never forgets where they come from.



"We are currently working with two Executive Assistants with SVBranches. They are both strong executors, detailed oriented and organized. They have both been a huge benefit to the organization. I was often told to get an Executive Assistant because it would change my life and they have added more value than I could have imagined. I am now able to focus on being a CEO and our organization is thriving. I would recommend SVBranches to anyone who wants to take their organization to the next level."

MA'AT LANDS

Founder and Executive Director

SCOPE OF WORK

HR Functions

- Acts as a point of contact for Rooted School Indy's new hires, including tracking all new hire paperwork
- Conducts background and reference checks, salary and employment verifications
- Assists with staff recruitment as needed

Finance

- Ensures completeness of supporting documentation for payroll processing and payments
- Invoice coding and data input into Quickbooks.
- Supports during audits, including preparing all required documentation for the auditing process

General Administration

- Responds to emails
- Schedules meetings
- Organizes travel and accommodations
- Manages client contact list
- Prepares customer spreadsheets and keeps online records
- Organizes Executive's multiple calendars.
- Maintains accuracy of School Nutrition Reporting
- Attends weekly Operation meetings
- Creates presentations, as assigned

BENEFITS

- Organized and managed back office support
- Established the systems needed to ensure the Executive Director is organized and focused on the mission of the organization
- Created an improved auditing process
- Developed a streamlined and effective invoicing process, resolving challenges with inaccurate invoice processing
- Enhanced organizational efficiency by converting invoices and staff files into electronic format and by implementing an electronic approval system, replacing the previous paper-based system