

Heart of Missouri United Way Job Description

Position Title: Administrative & Finance Assistant
Reports To: Chief Financial Officer
Supports: CEO, CFO, Resource Development
Hours: In Office, M-F, 30-40 hours, between the hours of 8am-5pm
Pay Range: \$15-\$17/Per Hour
Benefits: 100% Employer paid health, dental, Life & LTD, Paytient, for employee, low-cost vision,
5% Employer sponsored SEP IRA, 10 day's vacation, 12 sick days, 13 paid holidays, 4 personal days, per year.

CRM support:

- Utilizing the United Way CRM (Built on Salesforce) to ensure accuracy and overall reporting by managing day to day entry of pledge and payments, consisting of checks, credits cards and electronic transactions.
- Pledge and gift processing, and donor data entry/adjustments in CRM.
- Processing donor designations.
- Processing and preparing weekly and monthly accounts receivable reports in CRM.
- Reconciling Salesforce in a timely manner on a weekly/monthly basis to ensure it matches the QB's total campaign given.
- Enter over the phone pledges/credit card payments into Salesforce through GoodWorld.
- Pull 3rd party reports to connect checks/ACH payments with proper company, campaign year, and type of pledge.

Operations support:

- Manage and coordinate the smooth operation of office management, including reception, supplies, meeting room space, calendars, facilities and equipment.
- Manage vendor and other building tenant relationships
- Maintain phone extensions, door codes, and email lists
- Coordinate and manage staff time study sheets that allow the organization to see where allocated times are contributed per employee. This is completed 6 times per year. The time study sheets need to be completed and available for the auditor at their request.
- Primary contact for office administrative matters
- Provide administrative support to the CEO, COO, CFO.
- Primary Phone/Door Receptionist
- Maintain clean & organized front desk area, office supplies area, as well as conference rooms.
- Assist and attend events.
- Other duties as assigned.

Qualifications:

- College/Business School preferred (or commensurate office experience).
- Working knowledge of basic accounting and data entry, bulk mailings. Knowledge of utilizing a CRM database preferred.
- Advanced knowledge of Microsoft Office, Administrative practices, and office coordination.

Organizational Core Competencies

- **Adaptability:** anticipates changing circumstances and acts proactively to prevent crises; responds in an open-minded, constructive, and focused way.
- **Customer Relationship Management:** puts the customer at the center of every activity, process and communication; engages customers to improve their experience with the United Way brand.
- **Communication:** demonstrates effective verbal and written skills; utilizes various styles to get ideas across; confirms what is said to ensure mutual understanding.
- **Self/Staff Development:** actively participates in self-development through learning and development opportunities; seeks out opportunities to become not only more proficient in his/her role, but to gain more knowledge of the organization.
- **Strategic Thinking:** utilizes knowledge of the industry to leverage the organization's strengths; seeks out new channels and venues to deliver United Way's message.
- **Technical Expertise:** commands a thorough understanding of the subject matter for their role; keeps current and up to date with new information for their role.
- **Accountability/Brand Stewardship:** takes responsibility for the use and protection of all resources in his/her control; ensures use of resources that aligns with the mission of HMUW as well as with customer expectations.

Values that drive the professional character and behavior in this position are the organizational values of Heart of Missouri United Way, including:

- Trust
- Adaptability
- Equity
- Empathy
- Professionalism
- Perseverance

Diversity Commitment:

Heart of Missouri United Way is fully committed to achieving the goal of a diverse and inclusive staff. We affirm the inherent dignity and value of every person and strive to maintain a climate for work and learning based on mutual respect and understanding. We seek individuals who are committed to this goal and our core values.

Heart of Missouri United Way is an Equal Employment Opportunity Employer.

Name of Employee (Signature)

Date

Name of Employee (Print)

Name of CEO (Signature)

Date

Name of CEO (Print)

