

# MARSHALL COUNTY COMMUNITY FOUNDATION & UNITED WAY OF MARSHALL COUNTY

## JOB DESCRIPTION

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**Position Title:** Administrative and Programs Assistant

**Status:** Exempt/Regular

**Hours:** 8:00-5:00

**Reports to:** Executive Director

### SUMMARY OF POSITION:

Serves as the leader for organizational database systems as well as administrative and communications support. Assists with effectively planning, managing, and executing an on-line pledge campaign and identifies enhancements to the process and technologies to improve efficiency, effectiveness, and quality of the campaigns, grant making, scholarship and evaluation processes. Supports business needs with other technologies such as Customer Relationship Management (CRM) and Electronic Giving software. Assures data integrity. Supports users of CRM software by providing expert application and data knowledge. Understands and delivers services supporting business needs and priorities. This includes database administrative duties such as analysis and maintenance of CRM data, creation of executive campaign statistical reports, and performance of Database Mining Operations (DMO). Will assist with communications support as directed.

### MINIMUM QUALIFICATIONS:

- Passionate about UW/MC mission.
- Bachelor's Degree and a minimum of two years of relevant experience or equivalent combination of education and experience in technology related field.
- Valid Drivers License.
- Expert in database management, data mining, and troubleshooting user issues. (Microsoft Office; Foundant's Community Suite, Upic Solution's Donation Tracker, a plus).
- Strong organizational and written, verbal, and listening communication skills.
- Excellent problem-solving skills, research skills, and ability to follow through.
- Capable of handling multiple projects with competing priorities.
- Ability to meet deadlines while anticipating quickly changing needs.
- Attention to detail and accuracy.
- Work both independently and as a collaborative team member.
- High level of integrity, sound judgement, and decision-making ability.
- Ability to maintain a high level of confidentiality, a professional demeanor, and to represent the organization in a positive manner at all times.
- Efficient and friendly when working with both customers and staff.

### ESSENTIAL FUNCTIONS OF THE JOB

1. Collaborates with Executive Director, Community Impact and Communication Manager, and Resource Development Specialist to understand electronic giving needs, configure electronic giving sites accordingly, and achieve successful pledge processing integrations.
2. Subject-Matter-Expert (SME) on the systems and consult with others as needed to answer questions, navigate the system, and provide business intelligence.

3. Establishes and maintains positive and professional relationships with donors, donor companies and colleagues and utilizes effective communication skills to build effective on-line campaigns.
4. Understand the various Customer Relationship Management (CRM) tools to create, analyze, and implement reports for external and internal customers including CRM System Administration.
5. Document procedures on the CRM tools. Train others on systems and technologies including the building and utilization of reports and CRM.
6. Monitor various sources for national account data and assist with data conversion, clean-up, and uploads.
7. Keep current on software and participate in on-line training, webinars, and when possible, attend seminars to keep abreast of industry and system best practices and enhancements.
8. Create statistical reports as requested.
9. Facilitate the day-to-day clerical operations including front desk responsibilities, answering telephones, office supplies and the professional upkeep of facilities.
10. Develop and manage both paper and online file management and record-keeping systems.
11. Assist with incoming/outgoing mail, forms, letters, and bank deposits as directed.
12. Generate and track lists for special events, specific communications, and other activities.
13. Generates reports using the donor/client database systems for MCCF and UWMC (Community Suite and Donation Tracker).
14. Receives contributions and establishes tracking list.
15. Ensures fund distributions are compliant with all fund agreements and legal requirement
16. Support the Foundation Board of Directors and various Board committees, including the coordination and production of schedules, agendas, minutes, and associated materials with accuracy and timeliness.
17. Provide operational and clerical support to the Executive Director and other staff.
18. Provides support to Executive Director for Foundation re-certification process.
19. Oversee that MCCF/UWMC meeting rooms/locations are properly set-up for external and internal meetings.
20. Maintain accurately the Profile Management Module (contact information) in Community Suite and work with other staff members to more fully utilize Community Suite.
21. Supports the Grants and Scholarship processes from inception to evaluation under the direction of the Executive Director and the Chairs of the MCCF Grants and Scholarship Committees.
22. Facilitates the grantmaking processes including updates to grant templates each year and distribution. Activities may include contacting high school counselors to announce upcoming scholarships, connecting with advisory committees to update new members, and coordination of awards ceremonies that require a Foundation presence, as well as execution of fund agreements.
23. Provide for timely notification of all grant and scholarship committees, manage all MCCF and UWMC committee rosters, and keep Community Suite and Donation Tracker updated.
24. Provides information to MCCF and UWMC Grants Committee to assist members with a comprehensive review of grant proposals submitted and site visits, monitor agency compliance as appropriate, and ensure completion of final reports.
25. Prepares paperwork in accordance with language in the fund agreements and other terms and/or restrictions as specified by donors.
26. Ensures the annual MCCF Lilly Scholarship program is conducted timely and professionally with integrity.
27. Works with Executive Director to assure timely scholarship application processing, selection committee activities, transcript/performance monitoring, and scholarship disbursements.
28. Work with the Community Impact and Communications Manager to create communications for donors and the community about grants and scholarships awarded.
29. Will assist with web content management as directed
30. Will assist with content calendar and photo bank as directed
31. Will collect and report data on use of social media and web traffic as requested.
32. Provide support for all events in the managing and execution as directed.

## **KNOWLEDGE, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS (KSAP's)**

1. Demonstrated interpersonal skills necessary to deal tactfully and effectively with persons at all levels developing and maintaining productive relationships both inside and outside the organization.
2. Ability to work independently and in a team environment.
3. Ability to multi-task with attention to detail.
4. Proficiency in general office and administrative support and in operation of equipment and machines.
5. Demonstrated organizational and time management skills.

## **SPECIAL REQUIREMENTS** *(includes equipment, hours, physical demands)*

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

**Work Environment:** This position typically works in an office setting with a controlled temperature environment.

**Equipment:** This position is required to maintain a working knowledge of all office equipment including personal computers and printers, telephone systems, copiers, etc.

**Hours:** This position typically works a full-time schedule Monday-Friday between the hours of 8:00 am and 5:00 pm. Position requires flexibility to work weekends and evenings depending on events and may exceed the normal work week hours listed. Hours may be adjusted as per the Executive Director during high production times or tight project deadlines.

**Physical Demands:** Must be able to sit for long periods of time. Must be able to stand, climb stairs, walk, lift, carry, bend, and stoop. Must be able to perform fine motor skills. Hearing and visual ability required to read handwritten and/or typed documents, computer screens, etc. and answer telephone calls. Ability to drive from place to place. Must be able to lift and/or move up to 10 pounds. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.