

PARK COUNTY COMMUNITY FOUNDATION

POSITION DESCRIPTION PARK COUNTY COMMUNITY FOUNDATION

Position title: Finance and Office Manager

Part-time: 20 hours per week, non-exempt

Function: Manage day-to-day bookkeeping functions of the Foundation, Executive Director support, and overall office management

Overview: This is a half-time position working in support of and in coordination with the Community Foundation executive director. The primary duties of the office coordinator are in working directly with the executive director in managing Foundation accounting and business records; liaison with Fiscal Sponsorship and Donor Advised and other entities; supporting and helping organize the work of the executive director and the volunteer members of Community Foundation board of directors.

Reports to: Executive director

Primary responsibilities are:

- A. Account management: Works closely with the executive director and the Foundation accountant in management of Foundation QuickBooks to include handling transactions such as deposits and check preparation, assists in preparation of monthly financial statements and management reports, record-keeping involving receipt and processing for payment of all invoices. Demonstrated knowledge of Excel and QuickBooks is required. Works closely with executive director in preparation of materials serving as tax-exempt donation receipts and acknowledgment letters.
- B. Donor database management: Responsible for timely and accurate input and management of information and transactions in E-Tapestry donor database. Maintains Foundation USPS mailing list and email directory. Manages calendar to advise donors of pending pledges, prepares reports as needed.
- C. Fundraising and Development Support: Work directly with executive director to support and help execute annual fundraising plan.
 - a. Conduct research on individual, corporate, and foundation prospects.
 - b. Coordinate the production of a range of materials for donor solicitation, including background materials and collateral to leave with funders.
 - c. Assist in drafting proposals and funder reports.
 - d. Assist with planning and executing special fundraising events and other organization-wide events.
- D. Office coordinator responsibilities:
 - 1. Support meetings of Board of Directors
 - a. Attend and take Board and committee meeting minutes.
 - b. Assist in scheduling of meeting venues, assist as needed in organizing logistics for meetings (flip charts, projector, screens).
 - c. Assist as needed with developing the agenda materials for meetings, and distributing via email/Dropbox.

- d. Maintain schedules for meetings of the board and committees, and provide notifications as required
 - e. Follow up with members as needed to remind them about meetings and encourage attendance
 - f. Send hand-out materials to Board members unable to attend meetings
 - g. Assists executive director in preparation and compilation of Executive Committee, Board of Directors and other meetings as needed. Provides first draft of meeting minutes for executive director review.
2. Manage all office supply inventory.
3. Serve as office receptionist, answer telephone calls, taking messages and greeting visitors.
4. Responsible for filing hard-copy materials as well as electronic:
 - a. Frequent filing of constituent and accounting records
 - b. Maintain designated procedure for receipt, acknowledgment and subsequent written communications with pledged and donor-advised benefactors
 - c. Organize files of designated materials for easy access and retrieval
5. Office mail and email:
 - a. Retrieve mail from Post Office box, open and distribute as needed
 - b. Assist with mass mailings such as newsletters, annual report
 - c. Run specialized mail merges from donor database
6. Support for executive director
 - a. Schedules and organizes activities such as meetings, travel and Foundation activities for executive director
 - b. Update board if director manuals as needed in coordination with executive director and individual directors
 - c. Prepare monthly expense report for executive director
 - d. Proofread written materials as needed
 - e. Perform other duties as assigned

Skills and qualifications

- Preferred minimum of three years' experience in bookkeeping experience, preferably as leader worker, with significant experience in and knowledge of QuickBooks.
- Excellent planning and organizational skills, ability to handle multiple projects at once, with a high attention to detail and accuracy. Ability to use independent judgment and personal initiative.
- Ability to set priorities, define tasks, schedule and coordinate activities and functions; develop procedures and complete assignments, exercise independent thinking and good judgment, and maintain cooperative relationships with those contacted in the course of work assignments
- Ability to discretely handle and process sensitive matters and information, protecting confidentiality of closely-held information, Foundation data, and donor and customer relationships.
- Competence in office management procedures; English grammar, punctuation, spelling, and proofreading; operations of standard office equipment and software (Word, Excel, PowerPoint); and effective telephone techniques.
- Excellent communication skills.
- Ability to work occasional night and weekend hours
- Professional demeanor.
- An associate's or bachelor's degree is desirable.

To apply: Send cover letter and resume to Gavin Clark at gavin.clark@pccf-montana.org