

# MARSHALL COUNTY COMMUNITY FOUNDATION & UNITED WAY OF MARSHALL COUNTY

## JOB DESCRIPTION

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<b>Position Title:</b>	<b>Fundraising &amp; Finance Assistant</b>
<b>Status:</b>	<b>Non-Exempt/Regular</b>
<b>Hours:</b>	<b>8:00 – 5:00</b>
<b>Reports to:</b>	<b>Development Manager/Accounting and Finance Manager</b>

### SUMMARY OF POSITION:

The Fundraising and Finance Assistant is responsible for supporting the management of organizational accounting processes and the behind-the-scenes work of the organizations' fundraising activities; this includes data management, reports, appointment setting, and research. In addition to supporting the Development Manager and the Accounting & Finance Manager, this position will support general office and personnel administration.

### QUALITIES AND QUALIFICATIONS

#### Minimum Requirements

- Bachelor's degree in a finance or accounting related field and three years of experience with accounts payable/receivable and general bookkeeping; Other degrees considered with relevant experience
- Strong experience with fund accounting and/or accrual accounting preferred
- Valid driver's license or other access to reliable transportation
- Versed in office management and administrative support, including proficiency with basic computer and printing technology
- Experience with QuickBooks, Foundant's Community Suite, and Upic's Donation Tracker preferred
- Commitment to improving quality of life for those who work and live in Marshall County

#### Interpersonal and Communication Skills

- Professionalism and high-quality customer service
- Strong written and verbal communication skills

#### Planning and Organizational Skills

- Time management and attention to detail
- Strong analytical and problem solving skills
- Follow through and integrity, especially when working independently

## ESSENTIAL FUNCTIONS

### Accounting and Finance

Assist in the management of organizational accounting processes:

- Updates and abides by accounting policies and procedures
- Execute monthly reconciliations and reporting
- Maintain accurate and organized supporting documentation
- Issue statements, invoices, payments, and donor acknowledgements in compliance with IRS regulations
- Classify and assign revenue and expenses as appropriate
- Compile and provide reports on fixed assets, investment and performance data
- Support annual reporting and audit processes
- Provide additional support in the absence of the Accounting & Finance Manager
- Assists in periodic review and negotiation of service contracts

### Resource Development and Fundraising Support

Provide logistical and administration support for fundraising activities, which include donor relationships:

- Support the planning and execution of annual and workplace campaigns
- Contribute to fundraising activities by setting donor and workplace campaign appointments, maintaining the relationship database, and representing the organizations well within the community
- Maintains accounts for UWMC Donation Tracker and MCCF Community Suite
- Tracks revenue generation, donor retention, and provides progress reports as needed

### Administrative Support

Support general office and personnel management.

- Assists in planning and executing events and in volunteer recruitment, training, and engagement
- Oversees employment verification and timekeeping
- Assists with front-desk administration and other projects as requested
- Assists with reporting necessary for MCCF and UWMC including United Way membership certification, maintaining IRS 501(C)(3) status, and grant requirements

## 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 temperature-controlled 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 but will require extended hours into weekends and evenings based on the schedule of activities. Hours may be adjusted during high production times or tight project deadlines.

- **Physical Demands:** Must be able to work at a desk for long periods of time. Must be able to speak over the phone and read written communications, as well as produce written communications. Must have access to reliable transportation with little notice. Must be able to lift, carry, and move lightweight office supplies such as personal computer.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.