

Title: Finance and Office Coordinator
40 hours/Non Exempt



Reports to: CEO

Position Summary: The coordinator reports directly to the CEO. Performs a wide range of administrative duties of a moderately responsible and complex nature, and administers projects and/or processes, as directed. Has the primary responsibility of supporting financial and office operations, and serves as a liaison to all stakeholders regarding events, purchasing, facilities, information technology, and operations. This position requires a high level of written and verbal communication skills, organizational skills, and knowledge of office administration.

Essential Job Duties and Responsibilities

- Provides optimum support to the team by remaining aware of goals, providing ongoing communication, and organizing priorities to meet deadlines.
- Resolves day-to-day operational matters. Keeps up to date with general office equipment functionality.
- Coordinates and arranges meetings, preparing agendas and materials, reserving and preparing meeting space, ordering food/beverages, and generally assisting with coordination and execution of meetings, as needed.
- Provides exceptional customer service: answers, screens, and directs incoming calls; greets all office visitors and directs to appropriate staff; handles routine questions and inquiries and directs questions of a complex nature to the appropriate resource.
- Supports team by assisting with copying, filing, mailing, and other tasks, as needed.
- Maintains inventory of office supplies and equipment. Tracks and orders, office and campaign supplies; manages the orderly storage of supplies and files; arranges for equipment maintenance.
- Supports UWGBACC-wide projects and events as needed, for example, Campaign Kickoff, and Annual Meeting.
- Coordinates a variety of mailings to include printing, coordinating documents, and providing direction to volunteers.
- Researches the purpose of each payment and reviews for proper authorization.
- Ensures all payments are coded accurately and applied in a timely manner.
- Reconciles credit card statement.
- Monitors the A/R aging report and assists with any follow-up.
- Provides management with timely updates on contracts, policies, and invoices.
- Prepares A/P payment runs for management reviews
- Prepares deposits with accurate backup materials and provides to appropriate personnel.
- Collects and files human resource related documents for sub-contractors, vendors, new employees, and volunteers.
- Assists management with audit preparations, UWW required surveys, and quarterly community impact reporting.

- Maintains and tracks documents according to the document and destruction policy. Organizes & files with accuracy.
- Establishes and maintains mailing lists and database files of board members, volunteers, and donors.
- Ensures the office is safe and secure.
- Participates in furthering United Way's mission.
- Meets or exceeds job competencies on a consistent basis.
- Performs other duties as assigned.

QUALIFICATIONS

- Associate degree in Accounting, Finance or Business, preferred. Experience will be considered as a substitute for education.
- Two years' administrative experience.
- Proficient with Microsoft Office (specifically Outlook, Word, Excel, PowerPoint) is required; must have strong technical and analytical skills, and ability to plan and manage multiple tasks.
- Experience with Microsoft office products.
- Work requires the ability to properly read and write well enough to type, edit, and proof general business correspondence and prepare reports.
- Position requires solid organizational, interpersonal, and communication skills.
- Knowledge of business office procedures, and familiar with basic accounting concepts.
- Excellent communication skills both verbal and writing
- Able to work with diverse group of people and accomplish results
- Extremely detail oriented with the ability to organize, prioritize, and meet deadlines.
- Able to follow directions and work independently or with a group.
- Knowledge of and experience with UW is desired.
- Energy and enthusiasm are a must.
- Must have valid driver's license, proof of auto insurance, and provide own transportation. Individuals are required to operate their vehicle observing legal and defensive driving practices.
- Values diversity and inclusion.

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

- Moves about inside the office to attend meetings, access file cabinets, office machinery, etc.
- Frequently operates a computer and other office machinery to compile and retrieve information, to draft and write, and to handle general and confidential paperwork.
- Occasionally positions self to reach files, binders, etc. above the head and/or near the floor.
- Occasionally must lift and/or move up to 25 pounds.

- Constantly uses vision abilities including: close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.
- Frequently exchanges information in person and/or in writing via telephone and computer.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to work in a typical office setting and is occasionally exposed to outside weather conditions. The noise level in the work environment is usually at average levels.

- Position works under the direction of the CEO.
- Objectives and accomplishments are subject to review by the CEO.
- UWGBACC employees are required to help promote a cooperative spirit within the organization and among its entire constituency.

The information in this job description is designed to indicate the general nature and level of work performed by the employee and does not list all duties of the specific job. You will be assigned other duties. This is not a contract for employment. United Way of Greater Baytown Area & Chambers County is an at-will employer. This job description may be revised by your employer any time.

I have read and understand my job description.

Print Name:	
Signature:	
Date:	

Date description revised: February 7, 2019