



United Way  
of Southwest Oklahoma

## JOB DESCRIPTION

### **Position Title**

Administrative Assistant

### **Position Reports To:**

#### **TITLE**

President and CEO

#### **NAME**

Lauren Ellis

### **Education:**

High School Diploma or equivalent required. Bachelor's degree preferred.

**Summary:** The Administrative Assistant is an integral part of the overall operation of United Way of Southwest Oklahoma. This support position requires excellent interpersonal customer service and communication skills; proficiency in QuickBooks & Excel; great attention to detail; strong organizational skills; and the effective use of time, volunteer talent, and technology.

**Duties:** Duties include, but are not limited to, the following:

#### **Administrative**

- Provide general administrative support to Staff and Board.
- Staff the office; respond to phone calls and emails; provide referral information as requested.
- Assist with organization of special events such as Campaign Kickoff /Day of Caring.
- Maintain office supplies.
- Oversee and maintain paper and computer filing system.
- Prepare and send Board Meeting Packets and Committee Meeting Packets
- Pick up mail from USPS and record accordingly.

#### **Financial**

- Maintain accounts receivable and payable in QuickBooks.
- Assist in managing annual budget.
- Assist with entering campaign pledges into Donation Tracker.
- Maintain all insurances for employees (i.e., renewals) and for office (i.e., building insurance, liability insurance renewals).
- Prepare pay sheets to be sent to the accountants bi-weekly.
- Prepare ACH batches for Funded Agencies monthly.
- Prepare and mail non-member payments quarterly.



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- Maintain and transcribe all Board of Director Meeting and Finance Committee Meeting Minutes.
- Maintain all Board of Directors Information (i.e., contact information and Ethics Agreements).
- Maintain all lists of Committee Volunteers.
- Maintain and compile all In-Kind Donations for the year.
- Prepare President/CEO monthly expense report.
- Maintain and compile Budget Variance Report for Finance Committee, monthly.
- Maintain and post all 401K donations monthly to employee accounts.

### Campaign

- Assist in preparation of campaign materials and direct mail campaigns.
- Assist campaign coordinators as needed.
- Support and staff special events and activities.
- Deliver campaign materials to various locations throughout Southwest Oklahoma.
- Deliver mailing materials to Lawton Post Office.
- Maintain Bulk Mail, Business Reply Mail and Postage Due Accounts.

### Other duties as assigned.

**Qualifications and Core Competencies:** The ideal candidate is mission-focused, relationship-oriented, collaborative, results-driven, self-starting and a brand steward. The Administrative Assistant must possess excellent organizational skills and demonstrate the ability to manage multiple tasks and projects with minimal direct supervision. Considerable ingenuity, initiative and tact are required, as well as proficiency with QuickBooks, excellent oral and written communication skills and the ability to maintain good interpersonal relationships with co-workers, volunteers, agency representatives and the public.

- Experience with non-profits, fundraising and volunteers preferred.
- Clerical skills including proficient use of computer software programs. Proficiency in QuickBooks and Microsoft Office applications required.



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- Oral communication and strong customer service skills to communicate effectively with the public in a courteous and helpful manner.
- Excellent writing and interpersonal skills.
- Flexible, multi-task oriented.
- Ability to work with minimal supervision.
- Must be able to safely lift 25 lbs.
- Must have access to reliable transportation/hold valid driver's license.
- Must be willing to submit to a background check