

<b>Title:</b>	Finance & Administrative Associate	<b>Group/Team:</b>	Accounting
<b>Reports To:</b>	COO	<b>Status:</b>	Full-Time
<b>Revision Date:</b>	March 2024	<b>FLSA Classification:</b>	Non-Exempt

## POSITION SUMMARY

The Finance & Administrative Associate is responsible for a full range of administrative support, the organization and coordination of office operations, procedures, and resources to facilitate organizational effectiveness and efficiency with specific areas of focus on Accounting, Data Maintenance, and Program support.

We win when we Live United®.

## KEY RESPONSIBILITIES/ESSENTIAL DUTIES OF POSITION

This job description describes the general nature and level of work performed by employees assigned to this position. It should not be construed as an exhaustive list of all required duties, responsibilities, and skills. Reasonable accommodations may be made to enable disabled individuals to perform the essential functions of the job.

- Intake and processing of all cash & checks per internal control guidelines
- Process all annual campaign envelopes and contributions
- Process Checks and Mail in a timely manner
- Data entry (donor information) and database maintenance (Andar and Salesforce)
- Managing main phone line, general e-mail inbox and inquiries
- Receive proper training to make quality resource referrals when community members call requesting assistance
- Assisting with calendar management, scheduling meetings, and regular tasks for the COO, and committee as needed
- Take minutes for committee meetings (i.e., Executive, Board, Finance, CIC, etc.)
- Ordering and maintaining office and meeting supplies
- Preparation (coordinating meeting lunches, setting up tables, etc.) and cleanup for organizational meetings
- Providing support to Assistant Director of Finance, COO and CEO as needed
- Support Marketing, Community Impact, and Resource Development as needed
- Assist with building maintenance needs (ordering supplies, routine maintenance needs, etc.)
- Fill in reception and direction of all visitors to the agency as needed

**Minimum requirements include:**

## EDUCATION/EXPERIENCE

- Bachelor's Degree or equivalent business experience
- Prefer 2+ years of administrative work experience

## OTHER SKILLS/ABILITIES

- Demonstrated skill in balancing multiple assignments.
- Computer/Office Skills: Strong proficiency in Microsoft 365 applications including Word, Excel, Outlook and PowerPoint
- Strong organizational skills and attention to detail

- Problem solving skills
- Effective administrative project management skills required
- Ability to maintain the confidentiality of highly sensitive information
- Excellent verbal and written communication skills required
- Ability to work with a diverse range of community organizations and populations
- A continual, passionate commitment to the work of United Way and the community we serve
- Ability to work in a collaborative team environment
- Flexibility to work outside of normal office hours as needed
- Ability to maintain a valid driver's license and insured motor vehicle at all times
- Ability to pass a pre-employment and routine criminal background check

## **UNITED WAY COMPETENCIES**

An individual must be able to demonstrate the following competencies at a satisfactory level:

- **Mission-Focused:** Catalyze others' commitment to the mission to create real social change that leads to better lives and healthier communities. This drives their performance and professional motivations.
- **Relationship-Oriented:** Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** Understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven:** Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Brand Steward:** Steward of the brand and understands their role in growing and protecting the reputation and results of the greater network.

## **PHYSICAL REQUIREMENTS and ENVIRONMENT:**

To accomplish the essential functions of the position, one must be physically able to frequently and routinely:

- Walking short distances
- Bending, stooping, twisting
- Reaching above and/or below the shoulder
- Handling/grasping documents or office equipment
- Sitting and/or standing for short or extended periods of time
- Clear speaking and adequate hearing sufficient to communicate effectively and respond appropriately in person and/or on the telephone
- Vision sufficient to read source materials and computer screen data
- Repetitive motions for computer equipment use
- Requires exertion of force of 20 pounds occasionally, 10 pounds frequently, and/or 5 pounds continuously to lift/carry/move objects, files, and documents
- Work is performed primarily in an office environment using standard office equipment

## **TRAVEL**

Travel is primarily local during the business day.

## **Note**

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and



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are subject to modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbent will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at-will” relationship. The job description is subject to change with or without notice at any time.

By signing below, I am acknowledging that I have read and understand the job requirements, responsibilities and expectations set forth in the job description provided for my position. I attest that I am able to perform the essential job functions as outlined with or without any reasonable accommodations.

Received and accepted by Employee:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

*United Way of Greater Lafayette is an Equal Opportunity Employer, Drug-Free Workplace and complies with ADA regulations as applicable.*