**MARSHFIELD AREA UNITED WAY, INC.**

**POSITION DESCRIPTION**

**RESOURCE AND OFFICE MANAGER**

**VOLUNTEER CENTER COORDINATOR**

**REQUIRED QUALIFICATIONS**

* Associates or Bachelor’s degree in Accounting, Business, Finance, Social Services or other related fields.

***-OR-***

* 3-5 years of related work experience

**PREFERRED QUALIFICATIONS**

* Customer service experience with special attention to volunteers or large groups of people
* Proficient with MS Office
* Experience working in QuickBooks or related accounting management system

**POSITION OVERVIEW**

Perform a range of accounting activities such as maintenance of the general ledger, preparation of various accounting statements and financial reports, and maintain donor database. Increase United Way’s capacity to engage community members/groups and funded partners through volunteerism to advance United Way’s work in Education, Financial Stability, and Health. Provide administrative and clerical support.

**ACCOUNTABILITY AND AUTHORITY**

The Resource and Office Manager is accountable to the Executive Director.

**POSITION DUTIES**

**Financial:**

* Pay monthly bills.
* Responsible for month-end financial reports.
* Maintain General Ledger of accounts.
* Bi-weekly payroll, monthly e-file reports, file quarterly 941 and UCT report as well as issue expense checks.
* Deposits
* Maintain list of CD’s and poll financial institutions for the current CD rates.
* Track petty cash.
* Issue W2’s and file end of year reports.
* Gather information for year-end audit.

 **Campaign:**

* Prepare campaign materials for each company.
* Attend and assist at campaign training, Kick-off, Thank You Celebrations and other United Way events.
* Coordinate all volunteers for campaign packet delivery.
* Send invitations for kickoff, campaign training and Kick-off events and Thank-you celebration.
* Coordinate all mailings of campaign.
* Assist support staff with campaign updates and other materials
* Prepare churn report for postcard mailing.
* Work closely with Marshfield Clinic and other large donors on their individual campaigns.
* Work with Executive Director on Spencer-Stratford campaign.
* Record pledge and payments made during the drive and thereafter on spreadsheet, post pledges and payment to Donation Tracker.
* Process credit card contributions.
* Maintain on-going Leadership totals during campaign and maintain Leadership lists (i.e. history lists, excel spreadsheets with mailing information).
* Send out invoices to donors for payments due on a timely basis.
* After campaign prepare Database II campaign report for United Way Worldwide.
* Compile Leadership list for annual report, order pyramids and year plates and send thank-you notes.
* Compile awards reports at end of campaign.
* Maintain retiree lists.
* Send thank you notes to donors.
* Send tax letters out the end of January to donors.
* Update and maintain campaign and database software and files and prepare special reports as needed.

**Volunteer Center Projects:**

* Work with community-based organizations to identify volunteer opportunities.
* Maintain and manage the VolunteerMarshfield.org website and Facebook page.
* Plan and organize special events that generate attention for volunteerism, which shall include but not be limited to Make a Difference Day, and United Way’s Day of Caring.
* Coordinate and provide training for volunteers to respond to volunteer management in the case of a disaster.
* Together with the Communication Director develop a marketing plan and marketing materials promoting the Volunteer Center and volunteer opportunities.
* Develop and maintain a list of volunteers to assist in capacity building of community organizations through their expertise in specific skills (i.e. marketing, strategic planning, financial, fund development…).
* Work cooperatively with Leadership Marshfield to identify new volunteer initiatives and assist these initiatives to have an on-going impact on our community.

**General Office:**

* Answer phone, take messages, answer general questions about United Way and Partner Programs, and refer persons to 2-1-1 or programs as appropriate.
* Correspondence for Marshfield Area United Way as needed.
* Work with support staff on mailings such as annual reports, newsletters, and posters.
* Attend all Board of Director meetings and/or other committee meetings as needed and take meeting minutes.
* Compile and update all agency lists as well as committee lists and training manuals for Board, committees and volunteers.
* Assist with special events.
* Responsible for the coordination support functions of the office including supplies, office machinery, internet, software needs and necessary computer updates.
* Prepare bulk mailings.
* Assist with CIC program funding agreements, prepare packets for panels, update program thumbnails, & other spreadsheets.
* Responsible for Reach Out and Read program
* Make out payments for R2P4A after approved by committee.
* Back up all data on a timely basis.

**General:**

In the establishment of this position description, all that has been described above and that shall follow, it is understood and accepted that:

* Statements made are not all inclusive nor shall the position be expressly limited to tasks therein set forth.
* Constitutional provisions, Board policy decisions currently in effect and future amendments, modifications thereto shall serve to further clarify this position description.
* In cases where authority to act is questionable, sound judgment must be exercised, referring to and/or seeking the advice of the Executive Committee or the Board of Directors whenever possible and feasible to do so.

**Physical Requirements:**

These physical requirements are representative of the physical demands necessary for an employee to successfully perform the essential functions of the position. The employee is required to talk and hear. The employee is often required to sit and use their hands and fingers to handle and feel. The employee is required to stand, walk, reach with arms and hands, climb, balance, twist, lean, move from one location to another and to stoop, kneel, crouch or crawl. Vision abilities required by this job include close and far vision. Reliable transportation and a clean driving record are required as the employee will travel throughout the region to visit with donors and programs at their preferred locations and to travel to UW events. Ability to operate a computer keyboard, lift files and boxes. Exposure to glare from a computer will be common. Ability to lift up to 50 pounds.

The work environment can vary from an office setting to outdoor activities. Participation in early morning and evening meetings/events will be required. The noise level in the work environment is usually quiet to moderate.