



## **POSITION DESCRIPTION**

### **Operations Specialist**

#### **Job Summary**

The Siebert Lutheran Foundation has invested more than \$130 million in Lutheran-affiliated schools, ministries, and human service agencies impacting the lives of families, congregations, and communities since its inception in 1976. Visit [siebertfoundation.org](http://siebertfoundation.org) for more information about our mission and impact.

The Operations Specialist reports to the President and serves as the Executive Secretary to the Board of Directors, including supporting the President in Board relations, agendas, presentations, and meeting minutes. The incumbent designs, recommends, and implements procedures for efficient management of the Foundation's information processing, grant review, systems development, and business operations. Facility management, financial management and employee benefits/policy administration are critical components under this position's purview. After office systems administration is fully mastered, the opportunity exists to be assigned a grantee portfolio.

#### **Education**

Associate degree or equivalent experience in systems development and administration is required.

#### **Required Competencies**

Due to the nature of the role, this individual must: demonstrate exceptional accuracy and attention-to-detail in written communications; have strong interpersonal skills and verbal communication; work effectively with internal team members and represent the Foundation to external audiences; and lead, facilitate and participate in meetings inside and outside the Foundation.

Requires attention to detail in all aspects and proficiency in the understanding and use of technology to facilitate effective work flow and process, particularly web-based grant management systems, QuickBooks, and Microsoft 365 file management. Requires working knowledge of maintaining corporate and financial records to ensure compliance with all regulatory bodies and annual audit.

Given the nature of the Foundation's work with faith-based leaders, strong values, ethics, and moral character are non-negotiable. An active Christian faith commitment is required.

#### **Equipment**

Must be proficient in the use of office technology including Intuit QuickBooks, Microsoft 365 Office, with Microsoft Word, Access, PowerPoint, Excel, and Outlook. Must be able to comprehend and efficiently use other web-based or software programs relative to the Foundation's operation, including Foundant Technologies Grant Lifecycle Manager, SmartSimple and BoardEffect - the communications portal for the Board of Directors.

#### **Contacts**

The incumbent will have regular contact with ministry representatives from Lutheran church bodies, clergy, high school and college administrators and faculty, auditors, bank representatives, investment managers, consultants, public officials, and Board of Directors.

## Job Relationships

The Operations Specialist is a key link across the Foundation's program areas and administrative functions. The Operations Specialist must be able to work effectively with personnel at all levels of organizations, from Board and C-suite to grantees, entry level staff, and free-lance grant writers.

## Supervisor and Work Direction

The incumbent works under the direct supervision of the President and does not have supervisory responsibilities.

## **Job Duties**

### Corporate Governance (30%)

- Attend Board and Committee meetings and create corporate meeting minutes
- Maintain corporate meeting records and track approval status of minutes
- Update corporate and Board policies and procedures as needed
- Track follow-up actions from each Board Committee and Board meeting for self and President
- Support the President in Board relations, agenda and other document creation, presentations, and in building the Board Books via the BoardEffect portal

### Financial Management (20%)

- Update master grant table and grant platform (SmartSimple) with all Board decisions
- Maintain financial records in QuickBooks and manage the integration between QuickBooks and SmartSimple
- Process accounts payable and track grant payment obligations to ensure payments are released on schedule
- Serve as liaison with financial professionals, accountants, consultants and other organizations essential to the Foundation's financial management
- Coordinate with CPA firm for their preparation of quarterly financial statements
- Conduct monthly bank reconciliations
- Function as first point of contact and coordinate annual PF-990 tax filing with CPA
- Function as first point of contact for annual audit with independent auditor
- Assist with preparation of Foundation's annual organizational operating and grant budget
- Track credit card receipts and reconcile credit card bill
- Track and reconcile petty cash

### Coordination of Benefits/Insurances (5%)

- Maintain a working relationship with the Foundation's insurance brokers (business insurance and employee benefit providers)
- Serve as a communication conduit to employees re: benefit renewals, payroll withholding changes, etc.
- Update Employee policies and procedures as required
- Prepare an annual benefits review for presentation to the Executive Committee as part of its compensation review, annually or as assigned

### Facility Management (10%)

- Function as primary liaison to landlord, facility service providers, e.g. security systems, etc., to ensure effective and efficient operation of office facilities
- Contact landlord and/or contractors as needed to coordinate repairs, maintenance, cleaning, and/or other concerns
- Track and ensure compliance with annual inspection requirements, e.g., replace fire extinguishers as required
- Oversee contractors and conduct quality assurance related to their work/services

- Coordinate outdoor window box plantings and indoor plant watering schedule
- Initiate and coordinate holiday decorations for office with the staff team
- Ensure the Foundation's computer system, telephone system, and all office equipment are up-to-date, functioning and performing efficiently
- Manage hardware and software maintenance, upgrades, and replacements as needed, in consultation with staff and IT contractor

#### Information Technology (10%)

- Lead "owner" of SmartSimple grant platform implementation, process improvements, staff training, and integration with QuickBooks
- Check all documents on BoardEffect on a monthly basis to ensure content remains current; relay any communications received from Directors to President
- Become proficient in and keep on top of updates to provide trainings for Foundant, SmartSimple, and BoardEffect to staff, grantees and Board as requested

#### Communications (10%)

- Write grant award letters, grant agreements, and other communications as required to grantees (via merge function in Word, in coordination with grant platform data)
- Proofread correspondence as requested

#### Program Officer (10%)

Maintain relationships, conduct due diligence, review requests and reports, evaluate impact, writes reports, and present information to the Board for grantee portfolio consisting of:

- Block grants:
  - Pastoral Leadership Development
  - Seminary Scholarship Aid Grant Program for Alternative Track Programs
- Other grants as assigned

#### Other (5%)

- Support projects as directed by President
- Assist with large-scale conferences, workshops, and convenings as assigned
- Actively participate in staff meetings, team-building activities, and trainings
- Complete other assignments as requested

#### **Salary Range & Benefits**

The compensation for this full-time salaried position, depending on the credentials, salary history, and experience of the candidate selected, will fall within an annual range of \$45,000-65,000, based on a market rate assessment.

Siebert Lutheran Foundation offers a generous benefits package, including funding 90% of employee individual or family medical insurance premium and contributing 15% of salary into a tax-deferred SEP employee pension plan.

#### **To Apply**

To apply, email a cover letter and resume to Charlotte John-Gomez, President & COO at [cjg@siebertfoundation.org](mailto:cjg@siebertfoundation.org) with the subject: "Operations Specialist Application." No phone calls, please. Applications submitted before May 31, 2019 will receive priority consideration.

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