

Community Foundation of Sarasota County

Job Profile

Title: Coordinator, Finance & Administration
Date: 11/18/24
Reports to: Chief Financial Officer
Supervises: NA
Status: Non-Exempt

Purpose:

Provide administrative and clerical support primarily to CFO. Incumbent is also trained on key administrative functions in other operational areas in order to provide support when staff changes and/or peak business cycles warrant such. *This is an in-office position and does not allow for remote work on a regular basis.*

Responsibilities:

- Provide administrative and clerical support to the CFO in the following areas:
 - a. ensure an efficient and flexible calendar by filtering requests from internal and external individuals, proactively notifying investment organizations of CFO's availability with regard to cash call approvals; reviewing weekly/monthly/annual commitments and planning with CFO to ensure preparedness for such; schedule internal and external meetings with stakeholders/vendors.
 - b. monitor incoming emails to identify priority issues that must be addressed by CFO, issues to delegate to Finance team members/operational areas, issues to schedule for meetings, print materials needed for meetings, etc.
 - c. screen incoming calls and escalate/forward as necessary.
 - d. prepare/gather sensitive financial, legal or institutional data for meeting/presentations at Investment, Finance and Audit Committee meetings and ensure materials are accurate and professional.
 - e. draft correspondence and agendas for internal leadership discussions and/or projects, Board of Director issues, etc.
 - f. take minutes of Board-Committee meetings (and distribute/track appropriately).
 - g. track and prepare expense and credit card reports.
 - h. make travel arrangements and monitor issues related to such.
 - i. collaborate with other administrative staff on issues relating to calendar management, administrative or organizational processes, knowledge-sharing, etc.
 - j. provide any other general clerical tasks including making copies, filing, and data entry.
- Provide ongoing Receptionist phone/desk support.
- Provide administrative support to other operational areas during staff changes, organization-wide initiatives/peak business cycles (i.e., scholarship/grant processing, Season of Sharing, The Giving Challenge).
- Other duties as assigned, based on business needs.

Qualifications:

- Minimum 4 years experience providing high-level administrative support.
- Experience supporting finance or accounting roles, with regular exposure to highly sensitive information; proven ability to maintain confidentiality of such.
- Nonprofit experience desired.
- Highly developed written, verbal and interpersonal skills.
- Strong time management skills; able to multi-task and adapt quickly when priorities change.
- Strong attention to detail and accuracy.
- Proficient with Microsoft Suite: Excel, Word, Outlook, PowerPoint.
- Experience with CRM and/or finance-specific software preferred.
- Able to self-support for basic computer and network problems; uses appropriate judgement when escalating for additional assistance.

Enabling Competencies Level 1:

Customer Service (internal & external relationships)

- Recognizes customer base/ stakeholders & importance of providing high level support.
- Responds to customers' issues/problems when presented, in a service-friendly manner.
- Meets customer's expectations in completing assigned work.

Business Awareness

- Understands common business terms and concepts.
- Understands how department/team efforts impact organizational goals.
- Understands organization's mission/values and objectives.

Change Navigation

- Accepts changes being discussed/proposed.
- Able to focus/stay on task when presented with change.
- Cooperates with change efforts and maintains a positive attitude.

Communication

- Demonstrates effective listening skills.
- Expresses thoughts clearly.
- Creates organized & accurate documents/deliverables.
- Seeks clarification when necessary.

Leadership (development of self & others)

- Accepts new responsibilities readily.
- Demonstrates professionalism in all tasks.
- Works with supervisor to set goals/objectives and develop a plan to achieve them.
- Follows through on expected goals/objectives.

Teamwork

- Participates in implementation of team's goals.
- Understands organization's, mission, values and objectives.
- Participates fully as a team member.
- Relates to others in a friendly and professional manner.

Priority/Work Management

- Understands the importance of individual performance within the team.
- Uses time wisely to accomplish assigned tasks.
- Utilizes resources effectively to deliver quality & timely results.

Innovation/Creativity

- Understands how the organization's mission applies to individual role.
- Collects and organizes data and provides reports, as requested.
- Applies knowledge of industry or organization in order to be effective in role.