

Position: Office Assistant for Planned Giving, Stewardship, and Treasury

Department: Finance

Reports to: Vice President of Finance/Director for Planned Giving/Associate Treasurer

Range: 56% - 76%

Last Reviewed: 3/25/19

Class: Hourly FT

Summary

As full-time Office Assistant to the Director of Stewardship and Planned Giving, assist the Potomac Conference Corporation (PCC) in accomplishing its' mission to grow healthy, disciple-making churches. As a team of biblical servant leaders, PCC provides leadership, training and oversight to their network of disciples as together they share the gospel of Jesus. They value Christ-like stewards, practical creativity, helpful collaboration, grace-filled accountability, and transformational learners.

Essential Job Functions/Duties

- **A biblical servant leader** (*who (1) serves as an authentic follower of Jesus and His mission, (2) engages others in a life of holiness, and (3) takes the initiative to equip others for His mission and growth of His kingdom*) that will assist the conference in accomplishing its mission and vision by modeling its' values.
- **Meetings:** Actively engage in monthly Office Staff meetings as well as other meetings, as requested.
- **Support:**
 - Supports Director of Stewardship and Planned Giving by performing all secretarial functions in a timely and professional manner including, but not limited to, correspondence and other dictation (preparing and distributing) and sending documentation to attorneys.
 - Maintenance of office files with appropriate systems of follow up.
 - Supports travel arrangements, scheduling and internal process of office travel requests.
 - Handles incoming phone calls and initiates outgoing calls as necessary.
 - Maintains Director's calendar makes necessary appointments and schedules various meetings as requested. Prepare and send seminar materials to churches.
 - Ordering of materials as needed for efficient departmental function.
 - Mail quarterly and year-end Trust statements from Finance/Treasury
 - Prepare and follow up Corporate Management Committee notifications, agendas, minutes, action notifications, Executive Committee actions needed and backup materials.
 - Assist Finance/Treasury with CURF application process.
 - Following NAD and PCC Working Policy and Guidelines, process required paperwork for trusts and wills and other documents and forward to committee as required.
 - Keep database current and accurate on wills and trust for office and field representatives.

- Prepare for Union audit and follow up when scheduled.
- Maintain active communication with Trustors, including, but not limited to, birthday cards and Christmas books.
- Maintain Crescendo Website (or current website service) with newsletters as well as PCC Stewardship webpage. Download materials to personalize utilizing InDesign or other current publishing software.
- Keep timely, accurate records with Western Adventist Foundation (WAF) as requested.
- Prepare and mail Sunset Calendar and Offertory Readings annually. Post on PCC website.
- Assist with communication to churches about Potomac Partners, Wills and Trusts, Stewardship bulletins, Investment labels, Etc.
- Process Labels Make Cents Program report
- Consistently and diligently safe guard confidential and private information.
- Assist as needed in other assignments as requested by Director or PCC.

Education, Skills, and Experience

High school diploma or GED required. Associate (AA/AS) degree desirable. College credits (12-24 months) in a related or applicable field may be acceptable in lieu of educational requirements. Microsoft Office Suite competency required. Adobe InDesign and other publishing software are desirable but not required. Pay attention to detail in a high-detail oriented environment. A proven track record of effective leadership, judgment, collaboration, learning, and character above reproach. Personally create annual spiritual growth and skill development plans.

Credentials/Licenses/Certifications

- Adherence to the minimum code of conduct set forth in the *Professional Baseline for Full-time, Hourly Employees*
- Valid documentation of legal right to work in the United States
- Valid driver's license.
- Certificate of Completion from *Verified Volunteers*, Child Protection Program
- Criminal Background Check
- International employees (usually on R1 visa) from countries where English is not the primary language, must provide valid, *English as a Second Language* (ESL) certification in general communication skills, up to Level 6.

Work Environment

Employee will be required to do the following for prolonged or significant periods; 1) sit; 2) stand; 3) traverse stairs; 4) lift more than 10 lbs. Overtime may be required, but no travel will be required. Any overtime requires prior supervisor approval; 5) Ability to appropriately handle stress and interact with others is an essential function of this job. This is an at-will employment position.