

## Diocese of Sacramento

### JOB DESCRIPTION

<b>DEPARTMENT:</b>	<b>The Catholic Foundation</b>
<b>POSITION:</b>	<b>Administrative Assistant</b>
<b>CATEGORY:</b>	<b>Non-Exempt – Full Time</b>

**SUPERVISOR:** Executive Director, The Catholic Foundation of the Diocese of Sacramento, Inc.

**JOB SUMMARY:** Provide administrative and clerical support to The Catholic Foundation in general and the Executive Director as directed. Work closely with other members of the department in accomplishing the mission of the Foundation.

#### **ESSENTIAL FUNCTIONS:**

##### **I. Primary Responsibilities:**

###### **Gift and Other Collections Processing:**

- Accurately identify donor designations for specific funds (ONE, ACA, Special Collections, others)
- Encode donor envelopes and create gift batches for cash, check, credit card, and ACH-EFT donations across funds
- Set up one-time gifts, pledges, and recurring donations based on donor information updates, including check, credit card, and ACH-EFT payments.
- Logs daily deposits in the cash book for record keeping and/or records ACA Parish Collections
- Receipts, proofs batches, and/or deposits.
- Understands the online giving process or/and maintains the online gift systems for gift processing.

###### **Parish and Donor Services:**

- Prepare and mail donor statements, weekly acknowledgments, and coordinate with external mail houses for statement distribution.
- Assist with parish ACA, Special Collections, and Online Giving, TCF Dashboards and donor inquiries.
- Handle gifts and other collections requiring specific attention 'RE exceptions' (e.g. chargebacks, bank-related issues) and reach out to donors and/or parishes for updated information
- Process incoming/outgoing mail from CF Staff as necessary to CF Donors, parishes, volunteers, vendors, etc.
- Process outgoing mail from Foundation staff as needed to donors, volunteers, vendors, etc., by U.S.Postal Service, UPS, or FedEx, as appropriate.
- Prepare for The Catholic Foundation board and subcommittee meetings, ministry days, campaign and special events; e.g., reserve room or facility; order, and set up food and

drink; and name tents; prepare folders for attendees containing agendas, minutes, and other handouts.

- Provide support to the Executive Director in other new and continuing fundraising efforts such as Relationship Building Meetings, online giving initiatives, Newman Center projects, etc.
- Process stock donations by preparing letters to donors with appropriate DTC letter. Maintain a log of pending donations. Alert Merrill Lynch as to possible upcoming stock donations. Alert the Chief Financial Officer (CFO) to pending donations being transferred through diocesan brokers other than Merrill Lynch. Identify donor on stock donations received as needed.

## **II. Secondary Responsibilities:**

- Contact donors and parishes to update records and resolve any payment discrepancies.

### **MINIMUM QUALIFICATIONS:**

**Education:** High school diploma; some business related college courses helpful.

**Experience:** Four years of broad, varied, and increasingly responsible clerical and administrative experience.

**Skills/Knowledge:** Proficient and accurate in working with numbers; detail oriented; working knowledge in computerized word processing (Word); working knowledge of spreadsheet software program (Excel); typing 60 WPM or better; working knowledge of modern office practices and equipment; ability to maintain strict confidentiality; professional temperament and appearance; ability to communicate effectively in oral and written forms using correct spelling, grammar, and punctuation; knowledge and understanding of the Catholic Church in general and the Diocese of Sacramento specifically; and ability to work and relate to a variety of personalities and cultures with diplomacy, friendliness, and poise.

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SIGNATURE OF EMPLOYEE

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DATE

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SIGNATURE OF SUPERVISOR

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DATE