



THE LION FOUNDATION

(POSTED 12/18/2024)

Job Title: Office Administrator and QuickBooks Specialist

Position Overview: The Lion Foundation Office Administrator and QuickBooks Specialist plays a crucial role in ensuring the smooth operation of the organization. This multifaceted role encompasses responsibilities ranging from administrative tasks to financial management, event coordination, and tax compliance. The ideal candidate is organized, detail-oriented, proficient in QuickBooks, and possesses strong communication skills.

Reports to: Executive Director

Time: 15-20 hours per week

Key Responsibilities:

Accounting

1. **QuickBooks Setup and Management:**
 - Maintain accurate and up-to-date financial records, including income, expenses, and donations.
 - Generate reports for budget analysis, and financial statements.
2. **Financial Processing:**
 - Process payments, including invoices, donations, grants, and reimbursements.
 - Reconcile bank and credit card statements to ensure accuracy and compliance.
 - Reconcile donor management software with QuickBooks monthly.
3. **Invoicing and Check Handling:**
 - Generate and send invoices as needed for services, pledges, or products.
 - Write checks, secure required signatures, and manage the process of payment distribution.
4. **Investment Account Management:**
 - Collaborate with treasurer and accountant to update investment account reports.
 - Ensure accurate recording of investment activities.
5. **Banking Operations:**
 - Handle bank deposits, ensuring accurate recording of funds and timely reconciliation.
 - Monitor account balances and manage cash flow as necessary.
6. **Financial Reporting for Board Meetings:**
 - Prepare financial documents, reports, and analysis for review at monthly meetings.

Programs, Projects, and Events

7. Event Coordination:

- Assist in planning, organizing, and executing events.
- Coordinate logistics, manage RSVPs, and provide on-site support during events.
- Maintain records for all programs, projects, and special events in coordination with the Project Coordinator.

Taxes

8. Tax Audit and Filing:

- Collaborate with the organization's accountant or tax advisor to prepare and organize documentation for yearly tax audit and 990 filing.
- Ensure compliance with all applicable tax laws and regulations.

9. 1099 Preparation and Filing:

- Compile necessary information and prepare 1099 forms for contractors and vendors.
- Ensure timely and accurate filing with appropriate tax authorities.

Office

10. General Administrative Support:

- Manage day-to-day office operations, including filing, correspondence, and scheduling.
- Order and maintain office supplies and equipment as needed.

11. Compliance and Documentation:

- Keep abreast of legal and regulatory requirements for nonprofits and ensure the organization's compliance.
- Maintain organized and up-to-date documentation, including contracts, agreements, and policies.

12. EITC

- Provide prompt documentation to EITC donors to acknowledge their donations in a timely fashion per State requirements.
- Assist Project Coordinator in tracking and reporting EITC donations as part of the annual reauthorization process submitted each year to DCED.

13. Meeting Documentation:

- Attend and record minutes during monthly board meetings, capturing key decisions, action items, and discussions.
- Distribute minutes to board members and Emeritus members.

14. Database Management:

- Establish and maintain a comprehensive database for donor management and lead contacts.
- Maintain donor software including business and individual donations, monthly recurring gifts, pledges, payments, and donor information changes.
- Regularly update and clean the database to ensure data integrity.

15. Alumni Database Maintenance:

- Regularly update and manage the alumni database, ensuring accurate contact information and engagement tracking.

16. Restricted Funds Tracking:

- Maintain a detailed record of restricted funds, ensuring that they are allocated and spent in accordance with donor restrictions.

17. License and Registration Maintenance:

- Manage and renew necessary licenses and registrations, including small games of chance license, tax exemption certificate, and other annual permits.
- Maintain yearly memberships to necessary outside organizations such as APEF and NSFA

Donors

18. Communication and Correspondence:

- Serve as a point of contact for donors.
- Draft, edit, and distribute communications.
- Create and send acknowledgement/ Thank you letters to donors.

19. Form Creation and Management:

- Design and implement donation and registration forms, utilizing appropriate software or platforms.
- Research, select, and implement an online giving platform to facilitate easy and secure donations from donors.

20. Major Mailings:

- Plan, coordinate data, and execute logistics for large-scale mailings, including annual appeal, end of year appeal annual reports, event postcards, and fundraising campaigns.

21. Donor Recognition:

- Maintain updated donor recognition lists including but not limited to the Lion Pride Society for Individuals and the Lion Pride Society Business Circle.

Other duties as assigned by the Executive Director.

Qualifications:

- Bachelor's degree in Business Administration, Accounting, or a related field (preferred).
- Proven experience with QuickBooks accounting software, including setup and management.
- Strong proficiency in database management and MS Office Suite (Word, Excel, Outlook).
- Excellent organizational and multitasking skills.
- Knowledge of nonprofit financial practices and compliance is a plus.
- Prior experience in event coordination or fundraising is advantageous.

Personal Attributes:

- Detail-oriented and highly organized.
- Strong analytical and problem-solving skills.
- Excellent interpersonal and communication abilities.
- Ability to work independently and collaboratively within a team.
- Commitment to the mission and values of The Lion Foundation.