

Our Lady of Lourdes

Position Description

TITLE: STEWARDSHIP ASSOCIATE
REPORTS TO: DIRECTOR OF ADMINISTRATIVE SERVICES
STATUS: PART-TIME (20 HRS/WEEK) / HOURLY / NON-EXEMPT

Primary Function

In support of the Pastor/Parish Director and the Director of Administrative Services, the Stewardship Associate assists with various functions needed for the administration of the parish as related to Stewardship. Responsibilities include bookkeeping, maintaining parish census and revenue records, assisting with the preparation of parish payables and maintaining payables records.

Major Position Responsibilities and Regular Activities

❑ Maintain parish revenue records

- Maintain parishioner membership database for accurate recording and communication
- Oversee the weekly opening of parishioner contribution envelopes and content verification
- Prepare deposit of all parish revenues weekly
- Assure all parish revenues are accurately counted and allocated properly
- Maintain, record and reconcile all parishioner contributions weekly, including electronic contribution initiation and transmission (i.e. ACH and WeShare)
- Prepare and distribute year end parishioner's contribution statements
- Maintain non-parishioner giving information files
- Collect and record annual Stewardship responses/commitments letters

❑ Prepare parish payables and maintain payables records

- Ensure proper documentation accompanies all payment requests
- Enter invoices and payment requests in accounting system for payment
- Prepare checks for payments due
- File and maintain accounts payable reports and documentation of payments

❑ Administration

- Prepare letters, statements, manuals and other communications as needed for the Director of Administrative Services or Finance Committee
- Prepare invoices for participants in GIFT, record payments received, create statements prior to each GIFT session and work with Directors of Religious Education for any outstanding payments
- Enter Paper/Printing and Postage charges into spreadsheets for all groups as recorded on appropriate logs in office for proper expense account allocation
- Implement the Stewardship Mailing every other month with support from Director of Administration
- Provide assistance to other parish office staff, including answering phones, attending to walk-ins and cover-basic duties when necessary
- Provide occasional payroll back up when needed.

- Guided by the rules and regulations as contained in the local policies or as prescribed in other official ways, as well as the policies and regulations of the Archdiocese of Milwaukee Office of Parish Finances.
- Maintain Archival records - label/file – in conjunction with Director of Administration

Qualifications

❑ Religious Requirements

- N/A

❑ Education

- Possesses a High School diploma or equivalent; associates degree in business or accounting preferred

❑ Experience

- Has two-years basic bookkeeping / business administration experience

❑ Skills, Knowledge, and/or Abilities

- Strong computer and software skills with an understanding of Windows, Microsoft Word, Microsoft Excel, ADOBE, OneNote and church management databases preferred (ParishSOFT, CMS, PDS, ACS, etc.)
- Basic understanding of the mission of the parish, and Parish Staff positions
- Demonstrates competencies in operating a variety of office equipment
- Good written and oral communication
- Possesses good organizational and time management skills, is detail oriented
- Works independently, though cooperatively with Staff and volunteers
- Utilizes a pastoral approach when dealing with people
- Maintains openness to ongoing skills and formation training

Working Environment

- ❑ Must understand the sensitive and public profile nature of the work of the church. Will adhere to the highest standards of good practices and confidentiality. Must be proactive in support of the church's mission statement, goals, policies and programs. Flexibility in work schedule and work styles is expected given the nature of a family centric parish.

ADA Physical Requirements:

- The employee is regularly required to sit, stand, walk, talk and hear.
- The employee is frequently required to sit for extended periods; use hands; reach with hands and arms.
- Close vision required for paperwork and computer.
- Able to utilize computer keyboard, monitor, and telephone.
- This role functions in an office environment and uses standard office equipment.
- Ability to lift 20 pounds.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

This description has been prepared to assist in evaluating various classes of responsibilities, skills and working conditions. It indicates the kinds of tasks and levels of work difficulty required of positions given this classification. It is not intended as a complete list of specific duties and responsibilities. Nor is it intended to limit or modify the right of any supervisor to assign, direct and control the work of employees under supervision. Nothing contained herein is intended or shall be construed to create or constitute a contract of employment between any employee and the Employer. The Employer retains and reserves any and all rights

to change, modify, amend, add to or delete from any section of this document as it deems, in its judgment, to be proper.

Employee Signature _____ Date _____