



Job Title: Fund and Operations Coordinator

Status: Full time; non-exempt

Date: August 2026

Reports To: Senior Director of Operations

Grade: 9

ORGANIZATIONAL MISSION

To enhance the quality of life for our citizens now and for future generations by building community endowments, meeting needs through grantmaking, providing leadership, and promoting collaborations on community issues.

PRIMARY PURPOSE OF JOB

The Fund and Operations Coordinator is responsible for managing operational and administrative functions for the organization, with an emphasis on supporting and coordinating the fund development process, in alignment with Community Foundation of the Ozarks' (CFO) mission, vision and values.

ESSENTIAL FUNCTIONS AND PERFORMANCE AREAS

- Support new fund development, including writing fund agreements, tracking new funds and managing the workflow process to a fully executed fund agreement.
 - This includes the project management program, Asana, and e-signature programs.
- Assist with producing and developing, as needed, fund agreements, advisor-managed agreements, memorandums of understanding and other documents related to the creation and management of funds.
- Enter all new funds into the foundation's fund management database system, CommunitySuite, to support the operations of new fund development.
- Assist with generating database reports to support operations, as well as the management and audit of the database regarding fund entry.
- Assist with necessary information, mailing and correspondence for, the Ozarks Charitable Real Estate Foundation including supporting the Senior Director of Operations in the coordination of the OCREF board and the acceptance, property management, and sale of donated properties.
- Serve as initial point of contact for service providers supporting CFO owned properties, donated properties, and CFO occupied office spaces; coordinate routine building and grounds maintenance, repairs, cleaning services, and operational needs in partnership with the Senior Director of Operations and IT Specialist where applicable.
- Provide primary oversight for scheduling, maintenance, licensing and repairs for CFO staff vehicles.

- Maintain and update office Emergency Operations Plan in partnership with Senior Director of Operations and IT Specialist.
- Perform light housekeeping, such as kitchen clean up, trash or recycling removal as needed.
- Complete supply ordering for CFO home office weekly and maintain the stocking of supplies in areas like kitchen, supply closet, workroom and refrigerators.
- Assist with commercial insurance needs for the CFO's affiliate foundation program.
- Write letters to acknowledge in-kind donations as needed.
- Complete tribute and memorial gift notification process weekly.
- Administer corporate matching gift and grant portals, partnering with the Finance Department on gift-related transactions and coordinating grant application activities, stakeholder communications, and portal access with internal teams and community partners.
- Assist with general CFO phone answering coverage as needed.
- Perform other duties and responsibilities, as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

- Proficiency with Microsoft Office Suite software; strong working knowledge of Word and Excel and familiarity with PowerPoint.
- Technical capacity to learn and understand database systems.
- Excellent customer service skills.
- Strong time management skills.
- Highly accurate and meticulous in recordkeeping.
- Ability to work cross functionally across departments with strong communication skills.
- Strong grammar and proofreading skills.
- Proficient with online office technology services, such as shared collaboration and document storage spaces, form builders, schedule-management programs, e-mail managers, e-commerce, password keepers, and willingness to explore, learn and adopt web-based office technology.
- Ability to work occasional early mornings or evenings and telecommute from home as necessary.

CFO CORE PRINCIPLES

Collaboration: *Connection builds community.*

Accountability: *Trust leads to transformation.*

Vision: *We are catalysts for legacy.*

CFO COMPETENCIES

Building Trust – *Interacting with others in a way that gives them confidence in one's intentions and those of the organization.*

Constituent Focus – Ensuring that the constituent perspective is the driving force behind organizational decisions and activities; crafting and implementing service practices that meet constituent's needs.

POSITION CORE COMPETENCIES

Building Constituent Loyalty - Effectively meeting constituent needs; building productive constituent relationships; taking responsibility for constituent satisfaction and loyalty.

Building Strategic Work Relationships - Developing and using collaborative relationships to facilitate the accomplishment of work goals.

Engagement Readiness - Demonstrating a willingness to commit to one's work and to invest one's time, talent, and best efforts in accomplishing organizational goals.

Managing Work (includes Time Management) - Effectively managing one's time and resources to ensure that work is completed efficiently.

Quality Orientation - Accomplishing tasks by considering all areas involved, no matter how small; showing concern for all aspects of the job; accurately checking processes and tasks; being watchful over a period of time.

EDUCATION, TRAINING AND EXPERIENCE REQUIREMENTS

- High school diploma or equivalent required.
- Bachelor's degree in development, nonprofit management, marketing, communication, business or other relevant field preferred.
- At least one year of prior experience in office administration, customer service/relations, event planning or related field preferred.
- Must possess a valid driver's license and have a good driving record.

PHYSICAL CONTEXT AND WORK ENVIRONMENT

Physical Requirements	Percentage of Work Time Spent on Activity			
	0-24%	25-49%	50-74%	75-100%
Seeing: Must be able to see to read documents/reports and use computer.				X

Hearing: Must be able to hear well enough to communicate with staff, donors, vendors, and general public.				X
Sitting: Must be able to sit for long periods of time.			X	
Standing/Walking: Must be able to move about the work area.		X		
Climbing/Stooping/Kneeling: Must be able to stoop or kneel to pick up items off the floor.	X			
Lifting/Pulling/Pushing: Must be able to lift 20 pounds with or without reasonable assistance.	X			
Grasping/Feeling: Must be able to type, handle documents, and use equipment and electronic devices.				X

WORKING CONDITIONS

The work environment is usually a well-lighted, environmentally controlled indoor environment with moderate level of noise. Normal business hours are Monday through Friday 8am to 5pm with a lunch hour. This position may be eligible for remote work as agreed upon with supervisor in accordance with organization policies.

The statements herein are intended to describe the general nature and level of work being performed, but are not to be seen as a complete list of responsibilities, duties, and skills required of personnel so classified. Also, they do not establish a contract for employment and are subject to change at the discretion of the employer.

Employee Signature

Date