



JOB TITLE: IT & Operations Specialist
FLSA STATUS: Fulltime; Non-Exempt
DATE: October 2024
REPORTS TO: Executive Vice-President & Chief Financial Officer
PAY GRADE: 11

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 collaboration on community issues.

PRIMARY PURPOSE OF JOB

The IT & Operations Specialist plays a pivotal role in enhancing the CFO's IT operations, security, and infrastructure. This position provides ongoing technical support and ensures compliance with data governance policies and optimizing workflows to improve productivity. In partnership with the Managed Service Provider (MSP), the IT & Operations Specialist will oversee network infrastructure, manage user access, cybersecurity, and conduct regular audits while serving as the key liaison to other technology providers.

Additionally, they will evaluate emerging technologies, review and negotiate related contracts, lead software implementation projects, and maintain documentation for operational processes. The role also involves monitoring key metrics, reporting, ensuring data integrity, evaluating business continuity, and refining practices to enhance overall efficiency and security within the organization.

ESSENTIAL FUNCTIONS AND PERFORMANCE AREAS - *Other duties may be assigned*

The IT & Operations Specialist has the following financial responsibilities:

- Serves as the primary liaison with the CFO's managed service provider (MSP), enterprise database system, record-keeping systems, phone systems, building security systems, and other supporting technologies.
- Review and negotiate contracts for new software and IT services to optimize cost and performance, while ensuring compliance with legal and operational requirements.
- Create training materials and conduct training sessions for staff on new systems, software, and security protocols, while overseeing security trainings within the Knowbe4 (cybersecurity) system.

- Provide ongoing technical support and connect staff with the MSP for daily software and hardware issues.
- Implement and maintain data governance policies to ensure data accuracy, consistency, and security, regularly auditing practices to reduce risks of data loss or corruption.
- Identify opportunities for automating routine processes and optimizing existing systems to improve operational efficiency and productivity.
- Monitor compliance with industry regulations and internal policies, particularly regarding data security and privacy, and develop disaster recovery plans for critical systems with regular backups for different levels of business disruptions.
- Maintain thorough documentation of systems, processes, and procedures for reference, and document troubleshooting procedures and best practices for staff and other stakeholders.
- Collaborate with departments to understand their software and data needs, providing tailored solutions and evaluating emerging technologies for innovative improvements.
- Oversee basic network infrastructure (e.g., Wi-Fi, VPN, server maintenance), ensuring reliable access to resources, managing user roles and permissions, and conducting regular reviews to prevent unauthorized access.
- Act as the secondary point of contact between staff and information security committee.
- Perform regular reporting on key operational metrics, conduct audits for compliance with security policies, and lead the implementation of new software solutions to enhance operational processes.
- Ensure the SharePoint site is well-organized and user-friendly, regularly reviewing its structure and content for optimization.
- Oversee the creation and distribution of fund statements.
- Provide technical systems support to the Senior Director of Operations on relevant projects.
- Stay informed about system updates and effectively communicate changes to staff.

KNOWLEDGE, SKILLS, AND ABILITIES

- Time management
- Organization skills
- Business operations and technology experience
- Maintain high standards of professionalism, ethics and confidentiality
- Proficient with Microsoft Office Suite including Word, Excel, and Outlook; proficiency working with databases. PowerBi and Google Studios preferred.
- Knowledge of computer systems, including hardware, software, internet, and mobile device integration.
- Basic knowledge of how a network environment operates.
- Ability to communicate professionally verbally and in writing with staff and vendors.
- Willingness and ability to travel throughout the region as needed.
- Willingness and ability to work flexible hours including some nights and weekends as necessary.

CORE COMPETENCIES

Organizational 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 a driving force behind business decisions and activities; crafting and implementing service practices that meet constituents' and own organization's needs.

Department Competencies

Continuous Improvement: Originating action to improve existing conditions and processes; identifying improvement opportunities, generating ideas, and implementing solutions.

Decision Making: Identifying and understanding issues, problems, and opportunities; comparing data from different sources to draw conclusions; using effective approaches for choosing a course of action or developing appropriate solutions; taking action that is consistent with available facts, constraints, and probable consequences.

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

- Bachelor's degree in business, communications, information technology or related field or experience resulting in equivalent level of knowledge is required.
- Two plus years of experience in Information Technology industry as an IT Administrator or in a related position preferred.
- Able to handle multiple tasks and remain organized
- 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
Travel/Driving: Must be able to drive to regions as needed.	X			

WORKING CONDITIONS

The work environment is usually a well-lighted, environmentally controlled indoor environment with moderate level of noise.

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