



# TEXAS BAPTISTS®

BAPTIST GENERAL CONVENTION OF TEXAS

## OPEN POSITION POSTING

**Opening Date:** 01/03/2023 **Closing Date:** Until Filled

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**Position Title:** Executive Assistant to Treasurer/CFO

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**Department/Division:** Finance & Ministries Support Center

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**Job Type:** Full Time, Exempt

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**Location:** 7557 Rambler Rd., Ste 1200, Dallas, Texas 75231

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### **BASIC FUNCTION:**

To assist the CFO/Treasurer in providing financial and administrative support to the Executive Board staff and to manage the office of the Treasurer/CFO.

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**Position description/objective:** *NOTE: Some descriptions may have more specific duties and/or goals and objectives attached to this form. Such attachments normally reflect unique aspects of specific locations, shifts, departments, etc.*

- \*1. Prepare materials for the Finance Committee and Administration Support Committee meetings accurately and timely. Record minutes at meetings and transcribe accurately.
- \*2. Record minutes of Executive Board meetings accurately. Transcribe and distribute Executive Board minutes, summary of actions, member attendance and financial items for meetings. Assist to maintain Executive Board list of members.
- \*3. Backup Assistant to Executive Director with requests for Affiliation with Baptist General Convention of Texas.
- \*4. Effectively administer the Ministers Protection Plan with GuideStone Financial Resources. Notify churches when Texas Cooperative Program receipts drop below amount needed for matching and protection benefits for staff on the plan.
- \*5. Assist with proofing of the Annual Budget, Book of Reports, BGCT Annual, Budget Summary and other printed materials.
- \*6. Provide back-up responsibility for teller's at the Annual Meeting and preparation of materials.
- \*7. Provide back-up responsibility for individual corporate credit cards for BGCT employees.
- \*8. Maintain CFO's calendar with current information.

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- \*9. Process scholarship applications for children of BGCT employees.
- \*10. Process scholarship applications for the Roger Hall Opportunity Scholarship.
- \*11. Effectively administer calls and requests for meetings and information.
- \*12. Effectively organize and carry out the daily work in the office.
- \*13. Provide effective telecommunications support answering phones, taking messages, routing messages and requests timely and accurately. Accurately identify high priority callers and take immediate action to inform supervisor then properly manages routing of caller and/or messages to the appropriate individual.
- \*14. Maintain accurate database for contacts using established systems.
- \*15. Effectively plan for and coordinate meetings as assigned.
- \*16. Prepare for CFO's meetings and financial seminars, both in the building and in the field. Make room reservations, arrange for catering, print and order materials, etc. as required.
- \*17. Handle all personal correspondence and travel arrangements for the CFO/Treasurer. Notify the CFO/Treasurer timely of all information.
- \*18. Work with Conference & Events to proficiently negotiate with and work with hotels and other vendors to facilitate arrangements for meetings and other events as assigned. Present proposals to supervisor for review and approval. Secure approved vendors. Accurately review and process invoices for approval by supervisor and payment timely.
- \*19. Effectively manage tasks and projects assigned by CFO; research, analyze data and produce reports as required.
- \*20. Develop and implement processes for efficient operation of CFO's Office; responsible for continued alignment with budget goals; demonstrate operational competence.
- \*21. Establish and maintain Endowment and Legal files to include legal documents, correspondence, and other data as required. Endowment file maintenance will include proper dispensation of terminated agreements such as split interests combining into an endowment fund.
- \*22. Establish and assist to maintain accurate and timely record retention systems for all types of records.
- \*23. Oversee management of communication in CFO's office; process CFO's mail and discuss with CFO; follow up on communication as appropriate. Coordinate and perform professional communications with internal and external entities, including telephone calls, faxes and written communication.
- \*24. Greet guests to CFO's office; offer and provide refreshments.
- \*25. Effectively work with CFO to remain fully aware of his/her schedule.
- \*26. Research issues as appropriate and assigned by CFO.

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- \*27. Effectively work with co-workers to meet timely objectives established for the successful completion of a project.
- \*28. Accurately and timely process mail and other correspondence daily and distribute to appropriate staff timely.
- \*29. Prepare and proofread letters, memos, spreadsheets and other correspondence accurately and timely.
- \*30. Attend meetings and participate in training as required.
- \*31. Maintain compliance with all BGCT policies and procedures, as well as all state and federal laws.
- \*32. Perform Financial Edge requirements as needed to include but not limited to transaction initiative approval and primary Financial Edge Security.
- \*33. Perform other assignments and duties as assigned.

\*Task which is considered to be an essential function of the job.

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**Required skills and experience:** *NOTE: These requirements represent minimum levels in order to perform the job on a satisfactory basis. Candidates must have the ability to satisfactorily perform the essential functions of the job.*

1. In-depth understanding of a comprehensive field of knowledge, generally acquired through an earned Bachelor's degree from an accredited college or university or equivalent 4+ years minimum administrative support.
2. Active membership in church supportive of the BGCT during employment.
3. Commitment to Christian principles and teachings both professionally and personally, with an understanding and commitment to Baptist distinctives.
4. Ability to speak clearly and make self-understood in face to face interactions; to articulate with accuracy on the telephone.
5. Ability to draft professional letters and other business correspondence effectively and appropriately.
6. Requires excellent typing skills.
7. Must maintain confidentiality.
8. Ability to work under minimal supervision effectively.
9. Ability to make appropriate and effective decisions and exercise professional judgment regularly.
10. Ability to establish and maintain effective working relationships with staff, vendors, churches, committees, organizations, etc.
11. Proficient working knowledge and ability to use Financial Edge and Salesforce effectively.
12. Ability to operate standard office machinery to include but not limited to copier, fax, and calculator.
13. Ability to speak, read, and write English. Bilingual in Spanish preferred.
14. Proficient client management skills; accounting skills required to process invoices, vouchers, and checks and manage budget.
15. Ability to hear and receive verbal instructions, answer phones, and proficiently communicate in situations with some background noise.
16. Ability to concentrate on fine detail with some interruption; ability to focus attention on tasks for 45-60 minutes at a time on a continuous basis.
17. Ability to remember verbal and written tasks/assignments from a few hours to long periods of time.

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18. Ability to make appropriate and effective decisions and exercise professional judgment regularly.
19. Ability to take initiative and meet deadlines and handle requests appropriately.
20. Professionalism in the workplace to include accurate communication with others.
21. Proficient working knowledge and ability to use various office software including, but not limited to, Microsoft Word, Microsoft Access, Microsoft Excel, Google email, Microsoft PowerPoint, and internet skills.
22. Excellent professional communication and presentation skills required to speak in front of groups or to individuals.
23. Work deals mostly with areas such as preparing and reading data and figures, reports;, visual inspection involving small details. Although important, depth perception and field of vision (peripheral) are not as critical as the ability to distinguish small details and markings very near to the observer.
24. Ability to grasp, push, pull, carry or otherwise manipulate objects; ability to perform tasks requiring action of muscles or groups of muscles and foot and/or hand-eye coordination.
25. Requires ability to travel to various geographic locations. Some overnight stays required.
26. Ability to use up to 20 pounds of force occasionally and/or up to 10 pounds of force frequently to move objects.

**CONTACT:**                   **Human Resources**  
                                      **Phone 214-828-5168**  
                                      **FAX 214-853-4257**  
                                      **E-Mail [hr@texasbaptists.org](mailto:hr@texasbaptists.org)**

**Texas Baptists is an Equal Opportunity Employer.**