ASSOCIATE DIRECTOR TASKS

ROUTINE / DAILY

1 Respond to In Office Needs

Ensure staff have all items needed to complete their tasks
Trouble shoot issues as they arise
Correspond with agencies as needs arise (plumber, church, etc.)
Work closely with Board and executive staff to ensure all legal, financial, and ethical obligations are met in a timely manner
Primary signatory on Arvest Checking and Pryority Bank accounts
Submit all necessary paperwork to overseeing bodies or agencies (accountant, board, banks, insurance, etc.)
Hold weekly staff meetings to go over upcoming events, needs, and give adequate time and space for staff to express needs, concerns, or to brainstorm options in meeting client needs.
Investigate, evaluate, and take under Board advisement requests for large scholarships, larger purchases, and emergency housing needs - facilitate if approved
Approve regular purchase as needed

Keep a positive work environment for all staff members: including morale and effeciency boosting activities, celebration of professional and personal wins, notes of encouragement when needed, correction when needed. This helps them also have acceptance and understanding with the clients.

2 Respond to Executive Director's Needs

Review grant proposal, provide missing information, provide financial or relational history as needed

Provide support for new initiatives, collaborate on determining objectives and metrics for success, generate or find needed documents, attend meetings, and facilitate OHPM's capacity to successfully accomplish objectives
Coordinate community lunches to educate partnering organizations and other entities of OHPM's current programs and upcoming initiatives
Supply needed documentation as requested by Board, Advisors and Executive Director

3 Maintain donor relationships - ensure personal get well, sympathy, or thinking of you cards are sent from OHPM (staff sign) when needed

4 QuickBooks - data entry

Record, categorize, and clear all deposited donations
Categorize and clear all credit card purchases
Clear checks cashed and sweep account transactions
Monthly payroll allocation journal entries
Create "Overhead Allocation" report printed from QuickBooks
Deferred Income - Annual Event annualy
Deferred Income - Golf Outing annualy
Reconcile transactions for previous months

ASSOCIATE DIRECTOR TASKS

5 Neon - donor data base
- Record donations under appropriate campaign, purpose and source
- Donor reports - Executive Director; Board, Advisors
- Other reports as requested - Executive Director, Board, Advisors
- Maintain current donor contact information

6 Donation Acknowledgements
- Thank you letter usually sent within 48 hours of donation receipt
- In-kind donations acknowledgements
- Tax letters for donations over $250
- End of year combined donation tax letters sent each January

7 Mailing List - update contact information (address, phone, email) for current and new donors
- Remove outdated information as needed
- Mail merge lists
- Communication list for Executive Director (now on dashboard)

8 Grants - maintain files for previous, current, and soon to be submitted
- Provide data needed to generate grants
- Edit and update drafts
- Provide data needed to report use of funds previously granted; help craft response

9 OHPM Program Support
- Annually renew group code for Food Handler's permit - update form each year in January
- Facilitate OCNP membership renewal each year in April
- Support In-Facility events such as Play Day, Angel Tree, and Veteran's Club Dinner
- Car Club committee involvement, sign paperwork from Pryority Bank, keep electronic copies

10 InFacility Correspondence
- Maintain running database on inmates who have completed forms at Transition Fairs
- Mail follow-up letters 30-45 days before projected release reminding of OHPM services
- Submit list of inmates receiving letters to Sandra for follow-up tracking

11 Christmas Kindness - EWCC
- Communicate with EWCC chaplain to determine the number of inmates in December
- Determine amount that can be funded from underwriters/donors/sponsors
- Determine what needed items OHPM can supply for number of inmates at donated amount
- Research and procure items to donate
- Coordinate with donor/sponsor for a "work day" to prepare items for distribution
- Coordinate with OHPM staff / DOC volunteers to transport items to EWCC in timely manner
- Report costs and underwriting/sponsor numbers to Executive Director

ASSOCIATE DIRECTOR TASKS

EVENT COORDINATION

1 Communicate with Event Sponsors and committee
- Visit catering agencies and secure donated/discounted catering options
- Visit venue and secure date and time - submit deposit
- Maintain communication with all outside agencies participating in event (venue, photographer, sound/video, etc.)
- Verify all participation 1 month and 1 week prior to event
- Work with Committee to determine event flow, program order, and focus
- Prepare emcee script
- All volunteers - solicit their help, assign station, give itinerary and ensure supplies are present
- Generate process forms for volunteers to use at assigned stations (raffle ticket sales, incentives sales, credit card registrations, check-in, etc)

2 Maintain event registration information
- Keep a list of all donors/guests who will participate in event
- Track who has paid, what they owe, and who they wish to sit near (Gala)
- Work with committee to assign tables
- Provide alphabetized list of each guest, their host, and table number to registration staff
- Update information regularly for accurate numbers : catering, table renting, etc.

3 Maintain list of Vendors
- Keep contact information up to date: manager name, phone number, email address
- Update items and dates vendors have donated to events
- Complete and submit all donation requests required by email or through an online portal
- Acknowledgement letter sent within 48 hours of donation receipt
- In-kind donation tax form sent

4 Maintain list of Donations for Raffle or Live Auction
- Keep a list of items
- Securely store items received
- Separate items into Raffle or Live Auction - work with event committee to determine
- Track cost and contents of each raffle basket and any other pertinent information needed
- Track cost and contents of each Live Auction offering and any other pertinent info
- Generate "script" for auctioneer using Live Auction information
- Generate reports on each activity post event

5 Graphic Design - easy to read, pertinent details, credit to donor/underwriter
- Design, print, and send Save the Date approximately 4 months prior to event
- Design, print and display signs for each Live Auction
- Design, pring and display signs for each Raffle Item
- Design, print and display Hole Sponsor signs and Sponsorship Banner (Golf)
- Design, print and provide Program containing both Live Auction and Raffle Item - may also be emailed in advance
- Generate Power Point slides for each Raffle item, Live Auction item, Stage Presentor, Major Donors
- Generate any other Infographics to be used in Power Point presentation

Generate certificates for Live Auction Items needing a hard copy of gift (Southern Hills, Toni's Flowers, BurnCo., etc)
Design, print and provide Response Cards for event mailing and for event use
Design print and send invitations

6 Gifts for Sponsors / Presentors

Acquire and prepare gifts for Corporate Sponsors, Event Sponsors, Presentors, and Honorees
Send thank you notes to all participating agencies
Send thank you notes to all volunteers
(Golf) Determine swag bag contents, acquire items, and prepare bags for cart placement
Secure Items needed for event: (Golf) golf balls with sponsor logos, First Place awards, Second Place awards, Closest to pin award, and Last place award.

7 Post Event

Determine fair market value of Live Auction items - subtract this value from price paid by auction winner. Any price paid over fair market value is considered a donation. Any price paid at or below fair market value is not counted toward a donation.
Thank you letter sent for all donations
Tax letters sent for all donations over $250
Coordinate with accounting staff for accurate reporting of batch transactions
Record all transactions from event in QB and in Neon
Generate participation report
Generate Raffle results report
Generate Live Auction results report
Coordinate with accounting staff for accurate reporting of expenses and net revenue
Hold de-brief meeting with staff and committee for input on next year's event
Generate and send out questionnaire as needed
Ensure tax forms and letters of gratitude are sent to all donors, vendors, volunteers, and committee members