



Job Title: Client Services Associate - Temporary
Department: CS Operations
Supervisor: Manager of Client Services Operations
Supervises: N/A
Position Type: Temporary, Non-Exempt
Location: Fairfield, CT or Remote form home as directed
Date Posted: September 2020

Overview/Job Description

Principally responsible for grant-processing and grant-management as an administrative service to private foundations that comprise Foundation Source's client base. Processing responsibilities include, but are not limited to, reviewing grants for compliance concerns, proofing grants for clerical errors, and green-lighting grants for final publication and distribution (via mail or electronically) to their intended recipients.

Responsibilities/Duties

- Working with proprietary software and confidential client information
- Formatting, editing, and printing grant letters
- Preparing FedEx and USPS mailings/shipments
- Preparing electronic transfer details to distribute grant funds via wire or ACH.

Essential Skills & Character Qualifications

- Clear and effective communication, both written and verbal
- Respect for and adherence to client confidentiality
- Computer savvy, including competency with the Microsoft Office application suite (especially Outlook, Excel, and Word)
- Enthusiasm for administrative work
- Strong organizational skills, attention to detail, commitment to accuracy and excellent work product, employed with maximum efficiency, without being weighed down by minutiae
- Accountability and initiative with regards to executing tasks and coordinating with colleagues
- Proven ability to handle a high volume of work, prioritize issues and tasks, and to display "grace under pressure" and equanimity
- An action-oriented approach to work and desire to take on more, as necessary
- A constructive, can-do attitude, with a focus on achieving positive, successful outcomes, especially in challenging circumstances
- Receptiveness to feedback and critique, demonstrating maturity and self-awareness through a consistent willingness to listen, learn, and ask questions
- Strong client-service orientation and interpersonal skills, including a sense of diplomacy and a desire to be a key contributor to a smoothly running team and department
- A professional presence and demeanor in working with both internal and external constituents

Please send your resume, including cover letter, to **Jonathan Whelton-Pane** at jpane@foundationsource.com.

Applications without cover letters will not be considered.

Physical Demands and Work Environment:

- In order to perform successfully the essential functions of this position, an employee must generally be able to do the following: communicate verbally (speak and hear); use hands or fingers; handle or feel objects, tools, or controls; stand; walk; sit; reach with hands and arms; occasionally lift and/or move up to 15 pounds; and write coherently and grammatically in English. The position requires the ability to see objects, print, and/or images at close range and in the distance, and the ability to adjust focus. The noise level in the work environment is usually low to moderate. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of the position.

Note:

- This job description does not include all of the duties that may be required of an employee in this position. Other functions, tasks, and duties may be assigned by the Company, in its discretion. To perform this job successfully, an employee must possess the skills, aptitudes, and abilities to perform each duty proficiently. Educational and experience requirements listed in this document are the minimal requirements for consideration for the position. The set of functions considered “essential” is subject to modification by the Company. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of this position. This job description does not create an express or implied employment agreement; in the absence of a specific written agreement to the contrary, all Foundation Source employees are employed “at will,” and may resign or be discharged at any time, with or without notice.

Foundation Source is an Equal Opportunity Employer, maintains a drug free workplace, and complies with the ADA.

All applicants are considered without regard to race, color, religion, sex, gender identity, sexual orientation, pregnancy, age, national origin, ancestry, physical/mental disability, military/veteran status, genetic information, marital status, or any other protected characteristic under applicable federal, state, and local laws. By completing this application, you are seeking to join a team of hardworking professionals dedicated to consistently delivering outstanding service to our customers and contributing to the financial success of the organization, its clients, and its employees. Any applicant requiring a reasonable accommodation to complete the application and/or participate in the interview process should contact a management representative.