

**The United Methodist Retirement Homes, Inc.
Job Description**

Title: Development Specialist and Executive Assistant
Entity: The United Methodist Retirement Homes, Inc. (UMRH) and
The UMRH Foundation (UMRHF)
Reports to: The Director of Development
Assists: The Director of Development and Corporate Executive Director

SUMMARY:

Participates and/or assists in the development, implementation, and evaluation of both general giving and special fundraising activities for The United Methodist Retirement Homes, Inc. (UMRH) and The United Methodist Retirement Homes Foundation. (UMRHF) Assists with responsibility for activities such as annual giving campaigns, specified fundraising events, donor stewardship, and solicitation of gifts and sponsorships from individuals and/or corporations and maintains the records of UMRH and the UMRH Foundation. Serves as recording secretary and keeper of records for UMRH and UMRHF.

DUTIES AND RESPONSIBILITIES:

Development Specialist

- Plan and execute special fundraising activities, events and newsletters
Ex: Golf Tournament
- Coordinates as Editor-In-Chief of the preparation of the UMRH and UMRHF in Annual Report.
- Serves as recording secretary and keeper of records for the UMRH Foundation and UMRH, Inc.
- Creates and processes scholarship applications, coordinates award events.
- Coordinates all mailings and special solicitations.
Ex: Mother's Day Offering and Year End.
- Assists in maintaining and collaborates with Website management company regarding posts to UMRH, UMRH community and UMRHF website.
- Schedules appointments, meetings, webinars.
- Gather information and publish brochures and tributes.
- Processes Invoices.
- Assists Director of Development with Foundation Budget.
- Organizes and supervises volunteers for special events.
- Ensures the organization's compliance with fundraising policies and with relevant grant and foundation requirements.
- Ensures compliance with IRS 501 (c)(3) requirements.
- Applies for and maintains Foundation's Solicitation Licensure with the Secretary of State of NC.
- Maintains all donor gifts records and manages donor database using Blackbaud (Raiser's Edge/ NXT).
- Invoices outstanding pledges to donors monthly.

- Assist with cultivating new donors and provides statistics to the Director of Development for reporting.
- Monitors and prepares regular and complete reports for fundraising progress.
- Provides financial progress reports to the Director of Development.
- Performs miscellaneous job-related duties as assigned by immediate supervisor.
- Orders, prepares and distributes all donors' celebrations, i.e. donor birthdays, Holiday cards, etc.

Executive Assistant/ Office Coordinator

- Serves as Office Coordinator:
 - Process mail
 - Maintain files and historical documents, including organizational seals
 - Maintain postage machine, postage balance and service contract
 - Mails all Overnight or special mail handling & Invoices (FedEx, UPS)
 - Order and maintain office supplies for office use and all individuals in the Corporate Office
 - Stocks office supplies throughout office
 - Process invoices of all office supply vendors
- Manage and document all contracts pertinent to office management,
 - Verizon phone, Shred-It, Office Copier Management, Suppliers, Vendors
- Schedule and maintain Corporate Conference Room Usage Calendar
- Organize monthly staff meetings
- Schedule and plan monthly office birthday activities; circulate birthday cards
- Creates all Board meeting agendas & completes minutes of all meetings
- Creates all Board Committee meeting agendas & completes minutes of all meetings
- Maintenance and Administrator of Board Management Software (BoardEffect)
- Manage website updates and Directory Updates for Corporate Office
- Order Board and Employee Recognition plaques
- Notarize Documents for UMRH and UMRH Foundation
- Sends flowers/ cards to Office personnel, as requested by Supervisor
- Orders Nametags, business cards for New Office Hires

Hospitality Promises:

1. We greet residents, employees, and guests warmly by name and with a smile.
2. We treat everyone with courteous respect.
3. We strive to anticipate resident, employee and guest needs and act accordingly.
4. We listen and respond enthusiastically in a timely manner.
5. We hold ourselves and one another accountable.
6. We embrace and value our differences
7. We make residents, employees and guests feel important.
8. We ask, "Is there anything else I can do for you?"
9. We maintain high levels of professionalism, both in conduct and appearance, at all times.
10. We pay attention to details

MINIMUM JOB REQUIREMENTS:

High school diploma and at least 3 years of experience that is directly related to the duties and responsibilities specified. Experience in healthcare, retirement housing or non-profit industry strongly preferred. Experience in database management.

Strongly Recommended: Candidates with Associates and/or Bachelors Degree, experience in Blackbaud (Raiser's Edge NXT), Excel, Adobe Suite of Programs, including Illustrator, Experience with Event Planning and Project Management.

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:

- Knowledge of institutional fundraising, promotional, and/or public affairs programs, methods, procedures, and techniques.
- Strong interpersonal and communication skills and the ability to work effectively with a wide range of constituencies in a diverse community.
- Ability to coordinate volunteers.
- Records maintenance skills.
- Ability to create, compose, and edit written materials.
- Ability to provide excellent customer service.
- Ability to plan, organize and coordinate media activities and special events.
- Skill in the use of personal computers and related software applications (Microsoft Word, Excel, PowerPoint, Publisher, Outlook).

Job requirements/Working conditions:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to use hands to finger, handle or feel and talk or hear. The employee frequently is required to stand, walk, sit, and reach with hands and arms. The employee is occasionally required to stoop, kneel, crouch, or crawl and taste or smell. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

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