

**Statement of Work
For
Administrative Assistant Services
at
La Trinidad United Methodist Church
300 San Fernando
San Antonio, Texas 78207
Reference: Request for Quote (RFQ) Number
LTUMC-2024-0003**

1. General Description- Position Description-Administrative Assistant Services

1.1. The Secretary (known as a Contract Service Provider [CSP]) shall provide services IAW this statement of work (SOW) at La Trinidad United Methodist Church (LTUMC), 300 San Fernando St, San Antonio, TX 78207. The CSP shall serve as an administrative professional to the pastor in charge, managing the church office and working with lay leadership and the congregation to enhance administrative excellence and communication to strengthen the ministries of the church. The CSP shall not be a member of LTUMC congregation or related to any member nor accept “date” requests from any member. The CSP shall also acknowledge, understand and promote the United Methodist Church’s teachings and culture.

1.2. The CSP shall use basic administrative assistant skills and experience to keep the office administration and operations running smoothly by performing their duties in the administrative office located inside La Trinidad United Methodist Church. Basic administrative assistant tasks, to include but are not limited to, consist of answering the telephone in a pleasant voice, recording messages received, using office equipment (telephone, fax, copy machine), retrieving and opening mail, distributing the mail accordingly, filing, basic bookkeeping duties and computer skills using an Apple computer.

1.3. The CSP shall report to the LTUMC Senior or Associate Pastor for direction on all tasks and issues in question. The CSP shall work independently within established administrative assistant duties and procedures associated with the specific job function. The CSP shall have prior experience in all administrative assistant skills relevant to the job.

2. Tasks and Responsibilities

2.1. The following are tasks and responsibilities that the CSP shall perform on a daily basis while at work.

2.2. Receptionist Duties: The CSP shall receive telephone calls, directing the phone call or directing messages to the appropriate personnel. The CSP shall also receive mail and greet visitors directing the visitors to the appropriate personnel and responds to request for information and assistance. The CSP shall ensure the telephone is neatly available.

2.3. The CSP shall organize her work area to include documents and paperwork and maintain a filing system.

2.4. Monitor church office equipment: The CSP shall make basic repairs to the office equipment such as removing a jam in the copy machine and in the fax, load new reams of copying paper, and replacing or refilling ink etc.

2.5. General Understanding of United Methodist Church organizational structures and principals. The CSP shall maintain confidentiality with respect to all privileged information. Maintains all conversations with pastor in confidence.

2.6. Office Administration. The CSP shall use the Apple computer to maintain a smooth and orderly office. The CSP shall be proficient using basic skills and apps to perform the duties. The CSP shall post bulletins online, use the Chrome browser to research tasks, post data to ChurchTrac, use WordPress to post updated information and Excel spreadsheets to post other information. Church specific apps and sites will be discussed with the Pastors for further information. The CSP shall perform other daily duties as assigned.

2.1.7. Orders and maintains inventory of office and other supplies needed. Obtains and files minutes and other official church records and statistics in both electronic and paper format. Prepares and ensures statements are correct and mailed. Document expenses, earning and other financial information in spreadsheets or other appropriate system. The CSP shall perform other daily duties as assigned.

2.1.8. Facility Scheduling: Schedules and maintains church schedule and is knowledgeable of all events, facility usage and contractors and other visitors in the building; maintains the Church Calendar.

2.1.9. Communications: Gathers and maintains information regarding church visitors. Assists with contacting visitors.

2.1.10. Proofreads and makes correction (with the Pastors consent) to the church bulletin, newsletter, PowerPoint projects and assists with other associated mailings.

2.1.11. Maintains the membership and constituent database and directory with the Churchtrac software.

2.1.12. Gathers and maintains information regarding shut-ins and hospitalizations members and personnel needing pastoral care. Notifies Pastors of church members that are hospitalized or have recently passed away.

2.1.13. Assist Pastors and staff with church projects and tasks as well as other duties as assigned.

3. Bookkeeping Duties-The CSP shall:

3.1. Maintain records of financial transactions by establishing accounts such as financial documents from the sale of El Divino Salvador documents and other capital expenditures, expenses incurred and paid; posting transactions; ensures legal requirements for compliance. The CSP shall perform other daily duties as assigned.

3.2. Develop systems to account for financial transactions by establishing a chart of accounts; defining bookkeeping policies and procedures.

3.3. Maintain subsidiary accounts by verifying, allocating and posting transaction.

3.4. Balance subsidiary accounts by reconciling entries such as check books, checking and paying bills without signing the checks.

3.5. Maintain general ledger by providing subsidiary account summaries.

3.6. Balance general ledger by preparing a trial balance; reconciling entries.

3.7. Maintains historical records by filing documents.

3.8. Prepares financial reports by collecting, analyzing and summarizing account information and trends. Complies with church requirements by studying requirements; enforcing adherence to requirement; filing reports and advising Pastors on needed accounts.

4. Qualifications, Requirements, Skills and Experience

4.1. The following are qualification, requirements, skills and experience that the CSP is required to have:

4.1.1. Associate degree or 2 years of Bachelor's degree with 2 years experience as an Administrative Assistant or equivalent experience and a bachelor's degree in accounting, finance or other related field.

4.1.2. Previous administrative assistant and bookkeeping experience preferred.

4.1.3. Experience in working with multiple legal or church entities under different umbrellas.

4.1.4. Bilingual in English and Spanish (verbal communication).

4.1.5. Type at least 40 WPM

4.1.6. Demonstrated computer skills in Apple software, Microsoft Office, Google Office and PowerPoint.

- 4.1.7. Good people skills and professional ethics (two references required).
- 4.1.8. Verbal, communication and organizational skills. Being punctual.
- 4.1.9. Computer and technical skills. Analyzing information.
- 4.1.10. Typing, data-entry skills and note-taking skills.
- 4.1.11. Accounting and organization skills.
- 4.1.12. Problem solving and dealing with complexities. Multitasking. Attention to details. And thoroughness.
- 4.1.13. Confidential skills.
- 4.1.14. Must pass background check and keep “Safe Sanctuary” training up to date every 2 years.
- 4.1.15. Literate in English and Spanish (advanced proficiency in verbal and written).
- 4.1.16. Intermediate experience following data management practices and utilizing tools to implement data management.

5. Hours of Work and Daily Schedule

- 5.1. 8:00am – 1:00pm Monday – Thursday (20 hours/week)
- 5.2. Eight paid holidays: New Year Day, Good Friday, Easter Monday, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day
- 5.3. The LTUMC Church administrative assistant is directly accountable to the Pastor in charge and the Staff Parish Relations Committee (SPRC) and subject to annual evaluation.

6. Physical Demands-The CSP shall:

- 6.1. Be able to sit, stand, bend, and kneel for prolonged period of time while performing job duties.
- 6.2. Be able to lift 20 lbs.
- 6.3. Must be able to lift 20 lbs. and move about the Church grounds without any restrictions

7. QUOTE: \$ _____
Hourly Rate

8. I have read, understand and agree to perform the tasks and duties outlined in this position description. I certify that I can perform the duties of this position without accommodation.

Signature

Date

I approve the signed acceptance by the contract service provider to provide the required housekeeping services.

Approved by

Date

**A site Visit is available upon request. Contact Danny Tafolla, 201-387-6034,
Senior Pastor John Feagins – 227-0546, Associate Pastor Raquel Feagins – 210-227-0546**