



### SAN ANTONIO AREA FOUNDATION JOB DESCRIPTION

<b>DEPARTMENT</b> Development and Donor Service (DDS)	<b>TITLE:</b> Associate, Scholarship Programs	<b>REPORTS TO:</b> Executive Director, Scholarship Programs
<b>DATE REVISED:</b> October 1, 2023	<b>DATE EFFECTIVE:</b> December 15, 2023	<b>EXEMPT or NON-EXEMPT?</b> Exempt

#### THE AREA FOUNDATION

The San Antonio Area Foundation has served as the sole, designated community foundation for the San Antonio area for over half a century, growing to become one of the Top 20 foundations in the nation. The Area Foundation helps donors achieve their charitable goals for the betterment of the community, managing more than 500 charitable funds exceeding \$1 billion in assets. Coordinating efforts with numerous area nonprofits, the Area Foundation serves as a collaborative leader, connecting donors to address key community issues and investing in our future. Since 1964, over \$400 million for scholarships and grants have been awarded to enhance the quality of life in our region. Learn more at [saafdn.org](http://saafdn.org).

**Our core values are Excellence, Passion, Integrity, and Community.**

#### SUMMARY OF RESPONSIBILITIES

The Associate, Scholarships is a grant funded full-time position, with duties that include but are not limited to providing direct support to the Executive Director of Scholarships and team for the annual scholarship and cyclical disaster relief processes. Major areas of responsibility include becoming familiar with fund agreements, assisting with the scholarship application process, serving as point of contact in day-to-day hardships & disaster requests, updating student and company partner employee records, data entry, responding to telephone and email inquiries, and creating applications using the Foundant software, overseeing application evaluation processes, award, and distribution processes. The ideal candidate will need to be comfortable working in **high-stress** and **fast-paced** working environments, have great attention to detail and be highly organized.

#### COMPETENCIES/SKILLS

“The requirements listed below are representative of the knowledge, skill and/or ability required.”

- **Must adhere to Core Values: Excellence, Passion, Integrity, and Community (Required)**
- Knowledge and use of office management systems, (ex. fax, copy machine, and scanning documents) **(Required)**
- Proficiency in MS Office Suite products: Microsoft Word, Excel, PowerPoint, Outlook **(Required)**
- **Must understand that this is a temporary grant funded position and may end at any time**
- Proficiency in Foundant application and database software (Preferred)
- Excellent oral and written communication skills
- Excellent time management skills, ability to prioritize work, and work in a fast-paced, high-stress environments with frequent deadlines
- Ability to work independently and with team members
- Positive attitude, strong work ethic, and must demonstrate professionalism when working with sensitive material
- Strong customer service and ability to work with people of all backgrounds, ages, education, ethnicities, and sexual orientation

## QUALIFICATIONS

- Bachelor's degree (Preferred)
- Associate degree or at least two years of equivalent or transferable work experience in lieu of degree **(Required)**

## TASKS/FUNCTIONS

### Scholarships:

- Learning, understanding, and executing criteria of contracts and agreements for various application processes
- Generating scholarship application process each year to include forms such as the Evaluation Form, Conflict of Interest Form, and Follow Up forms, application forms and corresponding email templates
- Drafting and updating scholarship letter templates to be mailed with scholarship checks
- Administer and manage incoming applications for a small portfolio of other scholarship funds for grantmaking and distribution processes
- Receive documentation, i.e., transcripts from students and upload to application
- Developing and documenting and updating instructions for internal processes
- Process scholarship checks for mailing – match check with transmittal letters, create and save backup documentation, and stuff, postage and mail checks
- Ensure applicants meet fund criteria by completing due diligence of scholarship applications and editing as needed
- Process cancellations/refunds/reissues for students as needed.
- Create and update new profile and grant records in CSuite for newly awarded scholarship recipients or existing recipients
- Create committee evaluation reports for external scholarship processes
- Prepare payment reports for finance as needed
- Prepare payment installment by approving and syncing data from SLM to CSuite and making necessary edits (college and student id)
- Serve as a resource for scholarship applicants, recipients and renewal students through email, telephone, website, and social media
- Assist with logistics for meetings to include reserving the room, preparing materials, compiling scores, and requesting AV equipment
- Complete due diligence for college and universities
- Update high school information through internet research and phone calls
- Manage and support all fund(s) that fall within the scope of a particular donor of the San Antonio Area Foundation

### Disaster Relief Support:

- Generating hardship/disaster relief application process each year or as needed to include various forms and corresponding email notification templates
- Responsible for the due diligence of all incoming applications to ensure IRS and audit compliance.
- Provide support in large-scale disaster situations as a backup for data entry, creating installments, syncing records to CSuite and setting records in CSuite.
- Reviewing, posting, and paying awards as needed or in absence of Senior Associate or Director
- Understand and follow the hardship relief fund criteria and parameters for fund agreements
- Oversee the administration of incoming applications for the grantmaking and distribution process for corporate programs
- Responsible for meeting logistics to include reserving the meeting room, preparing materials, compiling scores, and requesting AV equipment, setting reservations, and other duties as assigned
- Maintain excellent internal/external client services by responding to email and telephone inquiries, assisting applicants in filling out applications in time of disaster or as needed, providing communication to external clients frequently.

General:

- Complete special projects as assigned by Executive Director, Scholarship Programs
- Ability to escalate issues and concerns to Executive Director between program, technical or fund.
- Training peers on the development team on how to use Foundant platform
- Stay abreast of trends and best practices in the scholarship distribution and application field.
- Stay abreast of software updates for CSuite/Foundant and collaborate with Executive Director, Scholarship Programs to implement or train on new features, etc.

**PHYSICAL DEMANDS / WORKING CONDITIONS**

The physical demands and characteristics of the work environment described here are representative of those occurring in the performance of the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee occasionally may lift and move up to 40 pounds.

**The San Antonio Area Foundation is an Equal Opportunity Employer.**

Please send resumes and cover letter to [jballesteros@saafdn.org](mailto:jballesteros@saafdn.org).