



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

1844 YMCA JOB DESCRIPTION

Job Title: **Director of Customer Transactions**

FLSA Status: Exempt

Start Date: Feb/March 2021

Position Type: New Position

Pay Range: \$70,000 - \$120,000

Reports to: Executive Director

Revision Date: January 2021

Location: Fulltime Remote (some limited travel may be required to customer Ys)

YMCA Mission: *To put Christian principles into practice through programs that build healthy spirit, mind & body for all.*

Salary is \$70,000 - \$120,000 per year based on experience and availability. This position is year-round, full-time exempt and includes generous medical, dental, vision, life, long term disability insurance options, paid vacation, and sick and holiday time. We provide contributions of 10% of your salary to the YMCA Retirement Fund for eligible staff.

We were founded as the Young Men's Christian Association in 1844. But today, we are The Y, an association that values, and is made stronger by, its diverse people. At the 1844 YMCA, we are committed to equal opportunity employment regardless of gender, age, disability, ethnicity, sexual orientation or religious affiliation.

POSITION SUMMARY:

This position is responsible for the leadership of the Customer Transactions team and all associated service delivery for MSO clients. This role will have the unique opportunity of building a team from the ground up and helping define the scope of services.

Responsible for the leadership of the Customer Transactions team and all transactions related to membership and program operational areas, including but not limited to the successful delivery of outstanding member service, accurate and timely completion of membership and program (participants) records and reports, payments including billing and invoices, and timely collection of accounts receivables. Emphasis shall be on maintaining the highest level of member service while working cooperatively with on-site Y staff. The incumbent ensures success by directing the day-to-day department's operation, leading and supervising staff to achieve departmental goals while operating within established business operations and procedures.

Above all there is a need for multi-tasking and having a relentless spirit of customer service.

ORGANIZATION OVERVIEW:

1844 YMCA is an exciting new venture sponsored by the SW Alliance of Ys and Y-USA that will operate as a fully independent nonprofit entity. The 1844 YMCA is focused on providing outsourced administrative services to YMCA associations across the US

including finance, human resources, marketing, information technology, risk management, member management, and facilities management.

There is already a strong customer pipeline ready to go, and the plan is to start onboarding customers on 4/1/2021. This is a great chance to help build an organization from the ground up.

OUR CULTURE:

Our mission and core values are brought to life by our culture. In the Y, we strive to live our cause of strengthening communities with purpose and intentionality every day.

We are welcoming: we are open to all. We are a place where you can belong and become. **We are genuine:** we value you and embrace your individuality. **We are hopeful:** we believe in you and your potential to become a catalyst in the world. **We are nurturing:** we support you in your journey to develop your full potential. **We are determined:** above all else, we are on a relentless quest to make our community stronger beginning with you.

QUALIFICATIONS:

- Four or more years of related experience with progressive responsibility in supervising office operations, including administrative functions, and computer operations.
- Two plus years' experience working within a non-profit organization
- Superior experience managing database software and using spreadsheets and documents to collect and distribute information for program directors and senior-level decision making.
- Proven knowledge, experience and leadership skills to recruit, train and supervise a high-performing team.
- Displays an entrepreneurial spirit and interest in creative problem solving in a start-up environment.
- Demonstrated experience dealing with confidential information to maintain the highest degree of privacy.
- Proven ability to prioritize workload and take direction from multiple sources.
- Showcases consistently professional interpersonal skills, public relations, and communication skills via telephone and in writing and have sound and independent judgment, plus proven ability to make sound decisions.
- Possesses the ability to communicate effectively with all types of people including members, staff, direct reports, volunteers, and supervisors.
- Proven ability to handle issues professionally with a cooperative spirit committed to character development by promoting and demonstrating caring, honesty, respect and responsibility to staff, lay leaders, YMCA members, program participants and the general public.
- Demonstrates an ability to respond to safety and emergency situations. Maintains valid CPR-PR, First Aid, and AED certifications.

ESSENTIAL FUNCTIONS:

- Manage all aspects of membership registration and billing, including but not limited to:
 - verifying information entered into operation system by branch staff, including checking for duplicates
 - processing and reconciling membership drafts.
 - billing collections for all paid in full members.
 - communication with members regarding age change, NSF, credit card expiration.
 - processing upgrades, downgrades, terminations, changes to account information.
 - verifying refunds for programs and memberships and approve processing, via automatic credit to accounts or check request.
- Work closely with local Y's on membership issues, including but not limited to:
 - providing reports and information in a routine and timely manner.
 - supervising the handling of all membership calls with the highest level of customer service.
 - managing all holds on memberships and billing including those due to promotions or special events.
 - managing all third-party membership billing.
 - managing all employee memberships.
 - tracking IBRS memberships and rate changes.
 - ensuring communication is made to the members either via mailed letters, email or phone calls.
- Train staff to develop expertise in operations platform.
- Manage all programs set up in operations platform. Work with Program Directors on timelines and program information required.
- Initially support, configure, and manage multiple operations platforms, but strive to develop a single standard operations platform for the MSO.
- Work with Development teams to manage collections, billing, and pledge support for Annual Campaign.
- Work with Association Childcare on set up of all childcare and preschool billing, including processing paperwork for drafts and collections for monthly billing. Verify all required information is provided by parents and Childcare has access to paperwork. Responsible for all third-party billing.
- Work with Camp and Childcare to help manage all Day Camp and Resident Camp registration, including cash receipts. Verify required paperwork is received from parents and that appropriate Day Camp and Resident Camp Staff have access to paperwork.
- Responsible for all end of day register reconciliation from branches, including balancing and reconciling bank deposits.
- Work with Controller to ensure compliance with all cash control procedures both on and offsite.
- Create and implement short- and long-term departmental goals, objectives and ensure that department structure and staff effectively accomplish these goals and objectives

- Ensure that the Executive Director is regularly informed of all customer and staff issues.
- Incorporate the mission and four core values of the YMCA in all communication with participants and co-workers.
- Handle all other duties, as assigned.

YMCA COMPETENCIES (Team Leader):

- Mission Advancement: Models and teaches the Ys values. Ensures a high level of service with a commitment to changing lives. Provides volunteers with orientation, training, development, and recognition. Cultivates relationships to support fund-raising.
- Collaboration: Champions inclusion activities, strategies, and initiatives. Builds relationships to create small communities. Empathetically listens and communicates for understanding when negotiating and dealing with conflict. Effectively tailors' communications to the appropriate audience. Provides staff with feedback, coaching, guidance and support.
- Operational Effectiveness: Provides others with frameworks for making decisions. Conducts prototypes to support the launching of programs and activities. Develops plans and manages best practices through engagement of team. Effectively creates and manages budgets. Holds staff accountable for high-quality results using a formal process to measure progress.
- Personal Growth: Shares new insights. Facilitates change; models adaptability and an awareness of the impact of change. Utilizes non-threatening methods to address sensitive issues and inappropriate behavior or performance. Has the functional and technical knowledge and skills required to perform well; uses best practices and demonstrates up-to-date knowledge and skills in technology.

PHYSICAL AND MENTAL REQUIREMENTS:

- Must be able to lift up to 40lbs. and carry files, documents and supplies.
- Knowledge of standard office equipment including 10 key calculators by touch, copy machine, fax machine, computers and printers.
- Computer skills to include Microsoft Excel and Microsoft Word applications.
- While performing the duties of this job, the employee is regularly required to use a computer for extended periods of time and be able to communicate using a computer and phone/smart device. The employee frequently is required to sit and reach, and must be able to move around the work environment.
- Specific vision abilities required by this job include close vision, distance vision, and the ability to adjust.
- The noise level in the work environment is usually moderate.
- 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 accommodations may be made to enable individuals with disabilities to perform the essential functions.
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Employee's Name (Printed)

Employee's Signature

Date