



POTTSTOWN AREA HEALTH & WELLNESS FOUNDATION  
JOB DESCRIPTION

POSITION TITLE: Grants Manager  
REPORTS TO: Senior Program Officer and Program Officer for Recreation and Health  
EFFECTIVE DATE: May 2024

**Summary/Objective**

The Grants Manager is an integral part of the Foundation's team. This position will manage grant processes and recordkeeping with regard to online applications, funding designations, required documentation, internal and grantee reporting, payments, and other administrative functions. The Grants Manager will work collaboratively with program officers to facilitate grantee information sessions, grant-related programs and projects, as well as provide support of annual grantee learning events sponsored by the Foundation. The Grants manager ensures communications of grant programs and processes are current and that policy and standard operating procedures are well documented. The position provides software and IT support including the continued integration of the AkoyaGo grants management and business central system (following a recent system conversion). A migration to Microsoft 365 is anticipated in the next 12-24 months and therefore project development and management will be sought.

**Essential Functions**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. Grantmaking, Database, and Information Technology Support:
  - a. Manages workflow and effectiveness of the grant administration process both internally among program, finance, development, other staff, and Board, as well as externally with grantees
  - b. Develops a good working understanding of each program's goals and strategies, and what each program will consider for funding.
  - c. Develops and maintains procedural guides for internal and external use in relation to grants processes and grantmaking software
  - d. Designs, administers, manages, troubleshoots, and maintains required software systems and forms to ensure accuracy and integrity of grants database and other program related data (ie: AkoyaGo, Adobe, JotForm, etc.) creating and maintaining templates, automated workflows and data structure to ensure a streamlined grants process.
  - e. Continually seeks greater efficiencies between database and grants process by keeping informed of "best practices" in the grant management field, informing program staff of

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latest developments and occasionally researches grant management systems that could improve Foundation workflows

- f. Develops and distributes a list of standard reports and forms to assist program staff and committee for strategy development and decision-making throughout the grants process
- g. Reviews grants process with Program Officers, Committee, and Grantees and proposes and implements changes to improve processes each grant round
- h. Manages data entry of all proposals received and saves all proposals to database
- i. Manages the alignment of grantee data with measures for grantmaking impact
- j. Manages grantmaking for grant cycles, and all special, off-cycle, and program specific grants and maintains systems for tracking proposals and awards.
- k. Monitors proposals as they move through the review process, and identifies, collects, and distributes application materials
- l. Prepares, disburses, and maintains grant agreements, reporting acknowledgements, and award and declination letters
- m. Tracks grant payments accurately and prepares for annual audit by performing internal review of records
- n. Maintains and updates communication templates and application forms, which occurs regularly to ensure grantmaking is responsive to community need
- o. Maintains Grants scorecard throughout the grant round process
- p. Submits timely reviews of compliance issues
- q. Provides IT and software support for staff within reason and as needed, and ensures all Grants Staff are well equipped to utilize and maintain clean data entry in software systems that are integral to grants and program.

## 2. Administration:

- a. Supports Program Officers in monthly preparation of Joint Grants/Impact Committee meetings, minutes, and follow up
- b. Works with Program Officers to provide appropriate feedback to grantees
- c. Serves as liaison to database software company
- d. Leads agendas and supports recordkeeping for internal Grants/Program staff meetings
- e. Prepares meeting packets, provides grants management related updates, and records minutes for Joint Grants/Impact Committee meetings, and attends Board meetings as requested
- e. Produces reports for Program Officers, President, Controller, and Communications Associate, as requested
- f. Maintains grantee and Grants committee contact lists
- g. Maintains an organized web-based database of documents, including Grants Staff best practice guide, for program staff's internal use and access
- h. Provides one-on-one tutorials to staff, committee, and grantees for use of grantmaking database and grant review process
- i. Troubleshoot technical issues for program staff, grantees, and committee members.

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- j. Provides direction and organization for internal contract related documents including scopes of work and contracts for software-related projects.
  - k. Administers and maintains accurate records and workflows for grant awards from regular grantmaking, staff discretionary awards, dollars designated by donors, and awards for special projects (ie. Community Voices Grant Fund)
3. Events & Meeting Coordination:
- a. Participates in community and grantee events and meetings on behalf of the Foundation, when applicable
  - b. Creates agendas for grants staff meetings, keeps meetings moving in timely manner, and records notes from discussion items, tasks, and decisions made during meetings
  - c. Coordinates the planning and execution of Grants Committee meetings with Office Manager and Senior Program Officer
  - d. Tracks RSVPs, prepares materials, and communicates with attendees as needed for project-oriented or grantee group meetings
  - e. Provides support to Program Officers for coordinating and scheduling for grantee and program-related group meetings using software tools such as Doodle poll, Calendly, or others that streamline the process.
  - f. Schedules Program Officer visits and meetings, attends as needed and upon reasonable request
4. Communications:
- a. Coordinates routine communications with staff, grants impact committee, grantees and others.
  - b. Provides one-on-one tutorials to staff, committee, and grantees for use of grantmaking database and grant review process.
  - c. Serves as primary point of contact with grantees by answering grantee questions related to the grant framework, online application process, technical troubleshooting, and Foundation requirements
  - d. Provides grant-related website updates as needed to inform the community of grant opportunities with accuracy and transparency.
  - e. Acknowledges receipt of proposals and communicates with prospective and current grantees throughout the entire grants process
  - f. Provides requested data to the Communications Specialist, as needed, for articles and website updates
  - g. Supports onboarding for committee members by providing documentation needed to communicate committee roles and responsibilities and how to navigate the grants management system

### Competencies

- 1. Job knowledge
- 2. Strong logic, analytical and problem-solving abilities

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3. Self-management
4. Teamwork
5. Flexible work style and multi-tasking skills
6. Collaboration and relationship skills
7. Technical capacity
8. Quality
9. Support of diversity
10. Customer service
11. Strong spreadsheet calculation
12. Strong writing and verbal communication skills
13. Creative thinking
14. Project leadership

**Supervisory Responsibility:** None

### **Work Environment**

This job is a hybrid position and requires 3-days minimum onsite in a professional office environment with a 2-day maximum as remote work. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

### **Physical Demands**

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.

While performing the duties of this job, the employee is regularly required to talk or hear. This is largely a sedentary role; however, some filing may be required. This would require the ability to lift files, open filing cabinets and bend or stand on a stool as necessary.

### **Position Type/Expected Hours of Work**

This is a permanent, full-time, exempt position that works 40 hours per week. Normal workdays are Monday through Friday, 8:00 a.m. to 4:30 p.m. Evening and weekend work may be required.

### **Travel**

This position may require travel for off-site meetings, professional development, community events, and grantee site visits.

### **Required Education and Experience**

Associates Degree, or equivalent experience in non-profit or grant management

### **Preferred Education and Experience**

Bachelors Degree, or equivalent experience in non-profit or grant management. Community Foundation and non-profit experience is a plus.

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### **Additional Eligibility Qualifications**

Experience with AkoyaGo, Microsoft 365, Power BI, or similar database software. Experience in Microsoft Office with high technical skill in Excel and/or Google Suite of software such as Google Sheets, and Google Docs is preferred. Other software experience in programs such as Microsoft Dynamics CRM, Smartsheets, JotForm, SurveyMonkey, Doodle polls, Calendly, or other e-form survey, or meeting coordination software would benefit the applicant.

**Salary range:** \$55,000 - \$68,000 (commensurate with related experience)

### **Work Authorization/Security Clearance (if applicable)**

### **Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

### **Foundation-wide specifics**

1. Is familiar with Foundation's mission and vision
2. Attends weekly staff meetings
3. Complies with all Foundation policies and procedures
4. Demonstrates flexibility in response to unexpected changes in workload, staffing and scheduling
5. Performs all other related work as requested by President, Board members and Committee Chairs
6. Applies principles of confidentiality to all Foundation matters