December 22, 2011

UNIVERSITY OF WISCONSIN-SUPERIOR
POSITION DESCRIPTION
University Services Program Associate, Small Business Development Center

POSITION: SBDC Office Manager

UW TITLE: University Services Program Associate

APPOINTMENT: 50%

POSITION SUMMARY: Provide administrative, database and financial records management support to the SBDC as well as customer service for one-to-one counseling clients and adult learners served by the SBDC throughout an 8-county region.

Report directly to the SBDC Director and assume delegated decision-making authority to ensure the continuity of small business outreach and counseling services. Supervise student workers and collaborate with other SBDC staff to maintain smooth work flow in the areas of training program event planning, implementation and promotion.

Support a wide variety of activities and provide a welcoming environment for the public, clients, instructors and ad hoc counselors. Maintain collaborative relationships with others in the Continuing Education and Extension units, campus offices and state SBDC administrative office in Madison.

This part-time position requires excellent written and oral communication skills, advanced problem solving ability and a working knowledge of the outreach and extension program areas. It requires occasional early morning, evening and weekend hours.

DUTIES:

A. Facilitate Client Counseling and Customer Service – 50%

- Enter and maintain counseling client information in electronic online counselor and SBDC Center EX database to meet state SBDC administrative office requirements. (60+ active client cases/year)
- Prepare and maintain hard copy counseling client case files to meet SBA requirements.
- Greet all walk-in clients and perform initial telephone and e-mail client intake, responding to requests for information, directing clients to statewide Business Answerline and other Web sites prior to arranging counseling appointments.
- Provide telephone and e-mail contact with counseling clients, in-county meeting sites and videoconference operators as needed to set up, confirm and remind clients about one-to-one counseling appointments.
- Arrange and coordinate client meeting or other meeting appointments on Director’s calendar to maximize time efficiency while being responsive to client needs.
- Facilitate each counseling appointment to ensure client and Director or Ad Hoc counselor are confirmed in advance and case file is up-to-date.
- Maintain a client contact follow-up procedure to ensure maximum service for second-stage, extended engagement and high impact clients.
- Perform counseling client database queries, creating reports through Center EX as requested by Director.
- Prepare file audits as requested by SBA and state SBDC administrative office.
B. **Manage SBDC Office and Financial Records – 30%**

- Prepare SBA, other grant and sponsorship invoices and deposit payments.
- Collect and receipt registration fees at classes and workshops, process credit card payments and/or issue invoices as needed.
- Process registration and financial data for classes and workshops in Certain and issue refunds as needed.
- Record course fees and direct class expenses into Certain software program and generate profit and loss reports for each class as requested.
- Maintain all hard copy files and shared electronic files of revenue and expenses, purchase requisitions and field orders, vendor files, encumbrances and charge-backs for all SBDC cost center (five cost centers) accounts.
- Monitor and follow-up on the status of all class fee payments and tuition grant receipts and send past due invoices as needed.
- Prepare purchase requisitions, ProCard orders, instructor service agreements, travel expense reports, food service and room requests as needed and requested.
- Record receipts of payments, scholarships, grant payment requests and receipts, and class attendance on state SBDC Center EX Web site, as needed.
- Compile paper documentation of ProCard transactions, stores orders, mailroom requests, and sort monthly by account as documentation for WISDM shared financial system comparison.
- Monitor and report monthly photocopier count and handle copier service requests.
- Handle service requests for telephone computer, printer and shared drive as needed.
- Monitor inventory and order office supplies and class materials to avoid stock-outs.
- Handle record-keeping and distribution of received items and shipping of items sent from the Center.
- Handle travel arrangements for Director and class speakers, as requested.
- Prepare for, attend and participate in weekly staff briefings.
- Complete special projects and other duties as requested by Director.

C. **Coordinate Class Registration and Student Service – 20%**

- Administer the registration processing for all class programs and workshops offered by the Center (approximately 50-60 classes/year).
- Provide administrative support to the Department staff in arranging for and implementing classes.
- Manage student registrations to ensure smooth entry, accurate enrollment counts and payment records.
- Upload training program enrollment data electronically to state administrative office monthly as required, and perform hard copy SBA event verification via fax and e-mail monthly as required.
- Upload and maintain complete SBDC course schedule in Certain and Center EX software programs, and the SBDC and WEN Web sites; updating changes as they occur to ensure 100% accuracy.
- Generate student rosters and sign-in sheets using Certain to assure that registrations are recorded with 100% accuracy and SBA requirements are met.
- Collect and process tuition payments from walk-in, mail and Internet registrations.
- Respond to telephone and e-mail inquiries from prospective students regarding course offerings directing them to one-to-one counseling if needed.
- Perform class participant database queries through Center EX as requested.
- Compile and distribute course schedule information to instructors, regional colleagues, students and the public if needed.
- Prepare and manage duplication of course handouts, booklets, binders and other materials if requested.
- Provide weekly updates of enrollment statistics to Director and Associate Marketing Specialist.
- Collect and compile summaries of all class evaluations.
- Assist other campus departments with online class registration and credit card payment processing as requested.
- Post information on SBDC Web site through the use of the University’s Common Spot software system if needed.

**Knowledge and Skills for this position:**
- Thorough knowledge of UW-Superior’s policies and procedures.
- Thorough knowledge of People Ware course management system. Excellent writing and communication skills.
- Excellent customer service skills.
- Excellent organizational skills.
- Ability to exercise care for high level of accuracy.
- Ability to use Web page development and editing software.
- Ability to learn, enter data into and query databases.
- Other computer skills: Microsoft Office Suite (including Word, Excel, Outlook, PowerPoint, Access, Publisher) Acrobat, Common Spot, WISDM and Desire2Learn.
- Knowledge of current office procedures and practices.
- Problem resolution capacity.
- Ability to multi-task and work independently.
- Self-motivated.
- Effective time management skills.
- Effective team participation skills to contribute to the efficient operation of the SBDC.