

POSITION DESCRIPTION

Job Title:	OSNT Beneficiary Engagement and Outreach Admin		
Department/Program :	OSNT	Reports To:	OSNT Program Director
Location:	Salem	Travel Required:	Occasional local travel
Salary Range:	\$19.00 - \$24.00 / hour	Position Type:	Part-time; Non-exempt
Positions Supervised:	0	Management Team:	No

Position Summary

The OSNT Beneficiary Engagement and Outreach Administrative Assistant serves as a trusted resource for beneficiaries, families, and community partners. This position combines community outreach, educational program coordination, beneficiary support, and administrative assistance to advance OSNT's mission of improving the lives of individuals with disabilities through special needs trust services.

The Administrative Assistant is responsible for developing relationships with referral partners, coordinating educational opportunities, managing recurring webinars and trainings, and providing hands-on assistance to beneficiaries with trust-related forms and documentation. The ideal candidate is organized, compassionate, and passionate about serving individuals with disabilities and their families. This position reports directly to the OSNT Program Director.

General Expectations

- Perform duties in a manner that represents the accepted values in the field of disabilities and supports the mission and vision of the organization
- Exhibit a positive attitude toward job duties, coworkers, and customers
- Exhibit cultural sensitivity and respect the perspectives of coworkers, customers and all others whom you interact with as an employee of The Arc Oregon
- Be an active contributor to your team and collaborate on a consistent basis with other teams throughout the organization
- Demonstrate initiative, creativity and self-direction in fulfilling job responsibilities
- Remain knowledgeable and updated on trends and issues relating to persons with disabilities

- Positively and professionally represent The Arc Oregon and your program to the public, building constructive working relationships with service vendors, project funding sources, community agencies and other service recipients
- Routinely contribute ideas and suggestions to improve services and/or operations
- Maintain open communication with supervisor, executive director, and co-workers regarding assigned duties and potential challenges
- Perform all duties in a timely, accurate and thorough manner
- Maintain a current Outlook calendar and communicate changes with Supervisor
- Conduct business in a manner that is consistent with all policies and procedures of The Arc Oregon and its programs
- Understand The Arc Oregon's Conflict of Interest policy and communicate any potential or actual conflicts of interest to your supervisor and Executive Director
- Seek out, and participate in (as approved by Executive Director), continuing education and professional development opportunities necessary to maintain required certifications or credentials, as well as enhancing general knowledge and skills related to assigned job duties and topics related to your area of expertise
- Maintain regular attendance at all scheduled internal meetings and participate in assigned workgroups or committees as approved by Supervisor and/or Executive Director
- Communicate with supervisor to understand tasks and deadlines
- Understand the importance of confidentiality and maintain strict confidentiality standards at all times
- Follow The Arc Oregon's policy related to propriety information and report any known breaches of copyright infringement to the Executive Director

Specific Responsibilities

Community Outreach & Relationship Building

- Build and maintain relationships with attorneys, financial planners, case managers, care coordinators, nonprofit organizations, and disability service providers.
- Represent OSNT at community events, conferences, resource fairs, and networking opportunities when needed.
- Promote awareness of OSNT services and educational resources.
- Support the development of new referral partnerships throughout Oregon.

Education & Training Coordination

- Coordinate educational programs and training opportunities for beneficiaries, families, professionals, and community partners.
- Schedule and organize bi-monthly webinars on special needs trusts, public benefits, and related topics.
- Manage webinar logistics, participant registration, presentation materials, and follow-up communications.
- Assist in developing educational resources and outreach materials.
- Coordinate speaking engagements and presentations for OSNT staff and leadership.

Beneficiary Support Services

- Serve as a point of contact for beneficiaries and families needing assistance with trust-related processes.
- Schedule regular beneficiary support sessions, including designated office hours or appointments for completing forms and paperwork.
- Assist beneficiaries in completing trust-related forms, requests, and documentation.
- Provide guidance on submitting required paperwork and supporting documentation.
- Educate beneficiaries and families regarding trust procedures and available services.
- Maintain a high level of customer service and responsiveness.

Receipt & Documentation Support

- Assist beneficiaries with organizing and submitting receipts for reimbursement requests.
- Review documentation for completeness and follow up when additional information is needed.
- Support receipt matching and documentation tracking processes.
- Coordinate with trust administration staff to ensure efficient processing of requests.

Administrative & Internal Collaboration

- Maintain accurate records of outreach activities, beneficiary interactions, webinars, and training events.
- Track referral activity and community engagement efforts.
- Collaborate with trust administration and operations staff to support beneficiary needs.
- Assist with special projects and strategic initiatives as assigned.

Required Skills, Experience & Expertise
Any combination of the following education, experience, and/or training that would likely provide the required knowledge and abilities to perform the duties of the position • High School Diploma or GED or equivalent combination of education and experience. • Minimum of 2-3 years of experience in customer service, community outreach, social services, disability services, nonprofit organizations, or a related field. • Strong communication, organizational, and interpersonal skills. • Ability to explain complex information in a clear and compassionate manner. • Proficiency in Microsoft Office and virtual meeting platforms such as Teams or Zoom. • Ability to learn new software programs as needed to perform duties • Ability to work in a team environment which includes taking direction as well as working independently and collaboratively
Working Conditions
• Duties are typically performed in a variety of environments including: ◦ General office setting during traditional office working hours (8:30 a.m. – 5:00 p.m., Monday – Friday). ◦ Evening/weekend work is not anticipated but may be required under special or unique circumstances ◦ Off-site locations as necessary to participate in meetings, participate in continuing education opportunities, and attend conferences • This position may require some travel • Use of private vehicle is required – Employee must have a valid driver’s license, good driving record, and required insurance coverage, or provide an acceptable alternate method of transportation • An approved criminal history check is required
Acceptance

Employee Name

Signature

Date