



**FINANCE & HR DIRECTOR POSITION DESCRIPTION**

<b>Position Title:</b>	Finance & HR Director
<b>Reports To:</b>	President and CEO
<b>Type of Position:</b>	Full-time; Permanent
<b>FLSA Status:</b>	Exempt

**ROLE:** The Finance & HR Director provides fiscal leadership to ensure proper operational controls, administrative and reporting procedures, information technology infrastructure, and people systems; delivers reliable and accurate financial forecasts, operating and capital budgets, and performs detailed variance analyses; and provides ongoing development and training for staff.

**DUTIES AND RESPONSIBILITIES:**

**Financial (30%)**

- Supervise the Gift Administration and Accounting Coordinator, ensuring timely processing of payroll, accounts receivable, and accounts payable.
- Oversight of financial assistance, billing, and collection of tuition for CARE Academy.
- Reconcile CARE Academy revenue monthly.
- Execute daily bank deposits using the remote check scanner.
- Monitor bank accounts daily to ensure timely reporting of electronic gift and direct deposit payments.
- Manage agency dues and reporting requirements for United Way Worldwide.
- Maintain the office central filing system.
- Maintain general ledger and produce accurate and timely financial statements.
- Prepare annual budget by communicating with UWYC staff on the expectations of income and expenses in the current year and for the upcoming fiscal year.
- Engage cost center managers in monitoring expenditures and report budget progress.
- Prepare fiscal year end financials utilizing generally accepted accounting principles to allocate expenses and income.
- Manage capital investment and expenses to ensure UWYC achieves targets relative to growth.
- Serve as liaison to and provide support for the UWYC Finance Committee in planning meeting agendas, producing financial reports, identifying members, and leading strategic recommendations.
- Coordinate and lead the annual audit process, liaise with external auditors, and prepare the financial data necessary to complete the audit and Form 990.
- Reconcile donation and financial software monthly.
- Provide key coordination and leadership of an endowment, Charitable Gift Annuities, and stock gifts compliance program, including developing, implementing, and evaluating processes to ensure compliance with donor intent, applicable laws, policies, and the effective stewardship of endowment funds.
- Stay current on any federal/state financial policies or legislation that affects non-profits.
- Develop and implement training programs for staff and volunteers as needed to meet accounting needs.
- Refer regularly to the United Way Worldwide resources to learn about new policies and/or best practice recommendations.

### **Grant Management (30%)**

- Manage pre-award, award and post-award fiscal grant management working with program staff to ensure UWYC is in operational and fiscal compliance with State, Federal, and Private grant reporting requirements.
- Manage the grant disbursement process and reconciliation of fund balances to General Ledger and grant budgets.
- Maintain timekeeping system for all employees in order to allocate payroll expenses by grant, program and/or expense classification.
- Prepare a summary workbook of each grant analyzing YTD spending, grant balance remaining, and areas of under/over utilization with suggestions based upon the grant contract.

### **Administration (25%)**

- Collaborate with President and CEO to design, develop and implement business strategies and procedures that align short and long-term objectives with organizational vision and operational strategy.
- Collaborate with President and CEO in negotiating annual liability insurance.
- Manage information and technology vendor relationship and recommend capital improvements as necessary.
- Monitor the facility to ensure that it remains safe, secure, and well maintained.
- Serve as property manager for rental partners.
- Oversee effective system of internal controls, which includes written documentation of financial policies and procedures for finance, operations, IT, and facilities functions. Design and conduct training for staff with respect to policies and procedures.
- Ensure mitigation controls are in place to respond to adverse economic, tax, publicity, donor, and agency relations issues.
- Works on special projects and requests from the President and CEO.

### **Human Resources (15%)**

- Oversee the hiring, retention, and development of qualified staff.
- Manage all personnel and benefit files, job descriptions, and employee status.
- Serve as employee benefits administrator.
- Process all new hire on-boarding and employee off-boarding documentation.
- Design and host new hire orientation.
- Ensure effective recruiting, onboarding, professional development, and retention strategies are in place and comparable to market.
- Collaborate with President and CEO in the creation/maintenance of employee policies.
- Collaborate with President and CEO in negotiating annual benefit plans.
- Stay current on any federal/state HR and payroll policies or legislation that affects non-profits.
- Foster a success-oriented, accountable environment for a healthy workplace culture.

### **Other Duties and Responsibilities**

- Provide assistance as needed to other UWYC programs and personnel.
- Assist with UWYC Annual Campaign.
- Serve as a United Way of Yellowstone County ambassador at all times by communicating the mission and vision of United Way.
- Perform other duties as assigned.

### **QUALIFICATIONS:**

#### **Education and Experience**

- Bachelor's degree in a business-related field
- Five years or more of advanced accounting experience
- Proficient in GAAP and FASB guidance as applied to non-profit accounting
- Nonprofit experience, as well as federal, state, local government and private grant management knowledge/experience is preferred
- Experience in annual budgeting and longer-term strategic planning

#### **Knowledge and Skills**

- Demonstrated ability to manage software applications; proficiency in QuickBooks
- Demonstrated skills in the development and supervision of staff; ability to inspire and motivate others
- Ability to work with mathematical concepts such as probability and statistical inference
- Ability to apply concepts such as fraction, percentages, ratios, and proportions to practical situations
- Ability to interpret a variety of instructions furnished in written, oral diagram, or schedule form
- Ability to assist with conflict management and uphold UWYC values and ethics.
- Professional, organized, courteous
- Excellent written and verbal communication skills
- Ability to motivate self, complete tasks in a timely manner, manage multiple priorities in a busy environment
- Work effectively with a variety of people and personalities
- Consistent in quality and quantity of work
- Ability to work both independently and collaboratively in a team
- Ability to maintain confidentiality
- Ability to understand relationships between tasks and intended outcomes.
- Possess a valid Driver's license and current auto liability insurance and reliable transportation
- Available to work Monday-Friday daytimes with occasional evenings, weekends, or early morning.

### **OVERALL SKILLS & ABILITIES:**

1. **Language Skills:** Ability to read, analyze, and interpret professional documents. Ability to write and create documents in a manner that is understandable and organized. Ability to effectively present information and respond to questions. Ability to use effective interpersonal communication skills when interacting with staff, donors, community partners, and others.
2. **Communication:** Excellent skills communicating with diverse individuals and groups.
3. **Reasoning Ability:** Ability to solve practical problems and deal with a variety of variables. Ability to synthesize a large amount of information into concrete needs and action steps. Ability to engage in strategic thinking and planning.
4. **Physical Demands:** The physical demands of the position are representative of those an employee

encounters while performing the essential functions of this job. The employee can expect to sit or stand in front of a computer for long periods, extensive use of computer keyboard, ten-key, and phone. General movement around the office for communicating with others, using the copier, and filing. UWYC may make accommodations for those with disabilities to perform the essential functions of the job. The noise level in the work environment is usually low to moderate.

#### **UNITED WAY CORE COMPETENCIES FOR ALL STAFF**

- **Mission-Focused:** Catalyze others' commitment to mission to create real social change that leads to better lives and healthier communities. This drives their performance and professional motivations.
- **Relationship-Oriented:** Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven:** Dedicated to shared and measurable goals for the common good, creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Brand Steward:** Steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.

#### **DIVERSITY, EQUITY & INCLUSION STATEMENT:**

Diversity is a core value at UWYC. We are passionate about building and sustaining an inclusive and equitable working environment. We believe every member on our team enriches our diversity by exposing us to a broad range of ways to understand and engage with the world, identify challenges, and to discover, design and deliver solutions.

Diversity, equity and inclusion are vital to achieving our mission, living our values, and advancing the common good. UWYC is committed to diversity, equity and inclusion within its own organization and the community. The officers, directors, committee members, employees and persons served by UWYC shall be selected in a manner to promote diversity, equity and inclusion and entirely on a non-discriminatory basis with respect to race, religion, national origin, ethnicity, age, gender, gender identity and expression, disability, sexual orientation, veteran-status, familial status, or socio-economic status.

UWYC offers a competitive salary, as well as, a generous benefit package; including a retirement match after one year of service.

Hiring Salary Range: \$53,000-\$59,000 DOE.

Interested applicants should submit a resume, cover letter and three references via email to: [unitedway@uwyyellowstone.org](mailto:unitedway@uwyyellowstone.org) using Finance & HR Director in the subject line.