



## FINANCE DIRECTOR POSITION DESCRIPTION

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

**ROLE:** The Finance Director provides strategic fiscal leadership, ensuring strong operational controls, effective reporting, and accurate financial forecasting. This role leads the preparation of operating and capital budgets, performs detailed variance analyses, and drives the financial health of the organization. The Finance Director works closely with organizational leadership and is supported by an Accounting Coordinator to implement financial procedures and fiscal strategies aimed at optimizing resources and maximizing community impact.

### DUTIES AND RESPONSIBILITIES:

#### Financial (50%)

- Supervise the Accounting Coordinator and ensure timely processing of payroll, accounts receivable, and accounts payable.
- Conduct monthly reconciliation of financial assistance, billing, and tuition collection for CARE Academy.
- Prepare and deliver accurate and timely financial statements.
- Develop the annual budget in collaboration with UWYC staff, setting income and expense expectations for the current and upcoming fiscal years.
- Engage cost center managers to monitor and report budget progress.
- Prepare fiscal year-end financials in compliance with GAAP, ensuring proper allocation of expenses and income.
- Manage capital investments and expenses, ensuring alignment with organizational growth targets.
- Act as a liaison to the UWYC Finance Committee, coordinating meetings, producing financial reports, and leading strategic recommendations.
- Lead and manage the annual audit process, liaising with external auditors, and preparing financial data for audit and Form 990 completion.
- Coordinate and oversee compliance programs related to endowment funds, Charitable Gift Annuities, and stock gifts, ensuring processes are aligned with donor intent, legal requirements, and effective stewardship.

#### Grant Management (40%)

- Support staff who oversee grants by providing pre-award, award, and post-award fiscal grant management; and working with program staff to ensure 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.
- Prepare and maintain a summary workbook for each grant, analyzing year-to-date spending, remaining balances, and areas of under/over utilization, with recommendations based on grant contracts.

#### Administration (10%)

- Collaborate with President and CEO to design and implement business strategies and procedures that align with organizational vision and financial goals.
- Ensure an effective system of internal controls is in place, including developing and documenting financial policies and procedures.
- Foster a collaborative and cohesive team environment with the Accounting Coordinator.
- Implement mitigation controls to address potential risks related to economic, tax, publicity, donor, and agency relations issues.
- Stay up-to-date on relevant federal and state financial policies, legislation, and best practices for non-profits.
- Refer regularly to the United Way Worldwide resources to learn about new policies and/or best practice recommendations.
- Stay current on any federal/state policies or legislation that could affect non-profit accounting standards.

### **Other Duties and Responsibilities**

- Provide assistance as needed to other UWYC programs and personnel.
- 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
- At least five years of advanced accounting experience
- Strong knowledge of GAAP and FASB guidance as applied to non-profit accounting
- Experience with nonprofit organizations and federal, state, local government, and private grant management is preferred.
- Proven experience in annual budgeting and long-term strategic financial planning.

#### **Skills and Competencies**

- Proficient in accounting software applications, especially QuickBooks.
- Strong leadership skills, with experience in the development and supervision of staff, and the ability to inspire and motivate others.
- Expertise in mathematical concepts such as probability and statistical inference.
- Ability to interpret a variety of instructions in written, oral, diagram, or schedule format.
- Professional, organized, and courteous demeanor.
- Excellent written and verbal communication skills.
- Ability to manage multiple priorities effectively in a busy environment, meet deadlines, and work independently or collaboratively.
- Strong analytical skills, with the ability to connect tasks and outcomes.
- Available to work Monday to Friday, with occasional evenings, weekends, or early morning hours as needed.

### **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.

**Hiring Salary Range:** \$59,000-\$65,000 DOE.

#### **United Way offers flexible schedules and a comprehensive benefits package:**

- 100% employer paid health/dental/vision premiums
- A minimum of 10 vacation days, 12 wellness days, 11 holidays, and 2 personal days
- Paid Summer Fridays off (Memorial Day through Labor Day)
- 403(b) with 5% employer contribution and 5% employer match after the first year
- Flexible spending and dependent care accounts
- Free Childcare at CARE Academy

Interested applicants email a resume and cover letter via email to: [unitedway@uwyellowstone.org](mailto:unitedway@uwyellowstone.org) using Finance Director in the subject line.