

# United Way of Southern Chautauqua County Job Description



**POSITION TITLE:** Director of Finance & Administration

**LOCATION:** Jamestown, NY

**REPORTS TO:** Executive Director

**COMPENSATION:** Full Time Position; Salary DOE. Benefits include health, dental and vision insurance; retirement and life insurance; vacation and sick time.

## **MISSION**

The United Way of Southern Chautauqua County mobilizes the community to help people improve their lives. UWSCC has an annual campaign of \$1.3 million and currently manages one large state grant, in addition to smaller federal and local grants. We currently invest in 26 community partners and 39 local programs working around common goals in Academic Success, Self Sufficiency, Ready Workforce and Health & Independence. In addition to supporting 2-1-1 WNY, we play a vital role in supporting a very successful VITA (Volunteer Income Tax Assistance) program.

## **OVERVIEW OF RESPONSIBILITIES**

The Director of Finance & Administration is detail-oriented and focuses on efficiently managing resources to support United Way's mission and strategic objectives. This occurs through timely and accurate processing of pledges and donor information; timely payment of all invoices and designations; monitoring bank accounts and investments; managing human resource information and benefits; coordinating information technology needs; preparing financial, campaign and donor reports. The Director of Finance & Administration seeks new opportunities to utilize technology to accomplish goals, sees the big picture and continuously reviews processes and procedures to gain efficiency.

## **CORE COMPETENCIES FOR THIS POSITION**

**Mission-Focused:** able to link donor, volunteer, and advocates' aspirations to needs, strives to accomplish goals, separates own interests from organizational interests

**Relationship-Oriented:** understands what motivates individuals and organizations, values diversity and inclusion, effectively communicates, actively listens to and facilitates diverse input and contributions

**Collaborator:** takes collaborative approach to addressing issues, mobilizes a broad range of resources

**Results-Driven:** focuses on results and can effectively communicate goals and impact, promotes innovation and is willing to take risks, holds oneself accountable and is self-directed

**Brand-Steward:** acts with integrity and strong ethics to foster trust at all levels (personal, market, society), internalizes the meaning and commitment of United Way and consistently acts according to its values and purpose, is accountable and transparent with all stakeholders

## **KEY RESPONSIBILITIES/ESSENTIAL FUNCTIONS**

- Utilizes standard accounting practices to maintain accurate financial records.
  - Prepares and completes all journal entries and strives to present monthly financial reports for review by the 10<sup>th</sup> of the following month.
  - Generates agenda items and provides supporting materials for regular meeting of the Finance Committee.
  - Provides necessary support and documentation to auditor to ensure timely completion of audited financial statements and filing of all state federal tax returns.
  - Oversees bidding for audit and investment management engagements.
- Completes donation pledging and payment entries in a timely and accurate fashion to support success of annual campaign.
  - Maintains confidentiality and integrity with all donor information – both individual and corporate.
  - Prepares donor tax receipts and processes all donor designations.
  - Complies with all United Way Worldwide Membership Standards related to financial management, pledge information and reporting requirements.

- Works with Resource Development Coordinator to follow up on questionable or vague pledge information and edits database to reflect changes indicated on the pledge cards.
- Works with Executive Director to follow up on unpaid pledges and strives to meet and exceed the budgeted uncollectable amount.
- Prepares reports to support Campaign volunteers and other staff - this includes developing new reports or tailoring reports for ease of use by all.
- Manages UWSCC grants of all sizes, including documenting payments and expenditures, optimizing grant administration process, ensuring compliance with grant regulations, and preparing financial reports.
- Manages accounts payable and ensures timely payment and maintains sufficient documentation.
  - Ensures contracts are in place with all consultants and contractors and reconciles payments to terms of said contracts.
  - Seeks opportunities to reduce the burden of payables by utilizing online and electronic methods whenever cost effective.
  - Works with Executive Director or Treasurer to review employee expense reports and documentation.
- Assists the Executive Director with preparing, managing and monitoring the adopted budget.
- Assists Executive Director with Human Resources
  - Prepares and submits payroll to contracted service and maintains all required documentation.
  - Oversees the annual benefits election process and responds to staff issues or concerns throughout the benefit period, including in areas of insurance, retirement, disability, and paid family leave.
  - Conducts analysis on health insurance options to present to the Personnel Committee.
  - Maintains personnel files in compliance with all regulations.
- Coordinates and oversees information technology that advances the organization.
  - Prepares and updates a multi-year technology plan.
  - Serves as direct contact to IT consultant(s).
  - Conducts research on innovative uses of technology or software.
  - Oversees the purchasing of all computers, phones and office equipment.
- Creates a positive image – is positive, charismatic, and can maintain the trust of donors and vendors.
  - Demonstrates self-control in difficult situations.
  - Maintains highest level of integrity.

## **REQUIREMENTS**

- Bachelor's Degree in accounting or related business field, with 3-5 years of experience.
- Preference given to those with organizational finance experience, especially in the non-profit sector.
- Proficient with Microsoft Office software and QuickBooks. Experience with database management is a plus. Experience with grants management a plus.

**To apply: Please send cover letter and resume to [arohler@uwayscc.org](mailto:arohler@uwayscc.org) by April 8, 2019.**