

POSITION DESCRIPTION

Position Title: Vice President of Finance

Reports to: CEO

Classification: Full Time Salaried Exempt

Location: Fort Myers, FL

Submit Cover Letter and Resume: Lisette@UnitedWayLee.org

ABOUT UNITED WAY OF LEE, HENDRY, GLADES AND OKEECHOBEE

United Way of Lee, Hendry, Glades and Okeechobee (UWLHGO) is a volunteer driven organization dedicated to improving the quality of life for all people in our community. This is accomplished through fundraising, fund distribution (90+ partners), community building, volunteer advancement, and information and referral. UWLHGO is an \$11 million nonprofit social services organization, with 56 employees in four locations with the main campus being located at 7273 Concourse Drive, Fort Myers, FL. The majority of funding is from private donations although UWLHGO also receives local, state, and federal grants.

OVERVIEW OF RESPONSIBILITIES

The Vice President of Finance for United Way of Lee, Hendry, Glades, and Okeechobee (UWLHGO) is accountable for the administrative, financial, legal, and risk management operations of the organization, including the development of a financial and operational strategy, metrics tied to that strategy, and the ongoing development and monitoring of control systems designed to preserve organization assets and report accurate financial results. The Vice President of Finance also oversees the Internet Technologies and Systems Administration staff to insure the efficiency and effectiveness of the organization's technology needs.

As the financial leader of the organization, the Vice President of Finance will serve as a valued member of the executive management team. The Vice President of Finance will directly influence and participate in the day-to-day financial operations, budgets and long range planning for the organization. The Vice President of Finance will have overarching responsibility for accounting, internal and grant-related financial reporting, short and long term financial planning, budgeting, audit, forecasting and analysis, tax and treasury operations.

The Vice President of Finance serves in an advisory capacity to the CEO and Board of Directors providing strategic leadership where needed. Working in tandem with the other executives, the Vice President of Finance collaboratively develops and implements the organization's short-term and long-term financial operating model. The Vice President of Finance provides organizational and functional leadership and direction with regard to all finance related activities, guided by a commitment to providing timely, accurate and high quality information and service. The Vice President of Finance will be a critical thought partner to the organization's program, marketing, technology, talent management, and fundraising functions.

KEY RESPONSIBILITIES/ESSENTIAL FUNCTIONS

The major responsibilities of this position include, but are not limited to:

Planning

1. Develops and evaluates short and long-term strategic financial objectives for the organization, ensuring always that they are aligned with overall strategy and mission.
2. Partners with members of the executive team to establish economic, financial and strategic objectives, to implement organizational strategy, and to oversee mission critical projects and initiatives.
3. Manages the budget and financial forecasts processes. Leads the budgeting and financial forecasting processes, as well as institutes and maintains other planning and control procedures.
4. Is adept at evaluating ROI and key process indicators for various resource development practices, strategies and programs and provides leadership to prioritize efforts and deploy staff and financial resources.

Operations

1. Oversees accounting and finance staff and related activities to ensure effective and efficient processes for all financial transactions which operate within established internal controls and allow for timely and accurate financial reporting.
2. Manages various banking relationships and utilizes banking products such as: online banking, ACH processing, credit cards, gifts of stock, etc.
3. Monitors and ensures the adequacy of cash.
4. Manages fund distribution, designations, pledge processing, payables, accounts receivable, payroll, credit card processing and compliance.
5. Staffs and maintains relations with Chairs and members of the key Board committees (Finance, Investments, etc.) under the Vice President of Finance's portfolio. Develops relationships with other committee and board members in order to serve their fiduciary oversight needs.
6. Is adept at managing the financial complexity of both unrestricted and restricted (designated) revenue streams. Understands the need to work with companies, donors, and public sector environments that are highly designated in an effort to: maintain these relationships; engage those donors and workplaces; effectively capture our costs related to these activities; and to measure progress in encouraging unrestricted support to our impact work.
7. Develops, instructs, directs, motivates, and supports staff across the organization but most directly within the function(s) s/he leads.
8. Demonstrates commitment to the effective use of technology within the organization, always ensuring that computers, databases, programs, and servers are functioning appropriately, safely and in accordance with contracts.

Financial Information

1. Provides timely and accurate analyses and financial reporting in order to ensure the highest level of financial oversight by executives and board members.
2. Interprets statistical and accounting information to assess operating results in terms of performance against budget, cash flow projections, long term sustainability, and the operating effectiveness of the organization.
3. Collaborates with program and fundraising staff to prepare grant applications and create budgets and reports. Understands financial requirements of governmental grants

including reporting, federal and state contracting processes, and regulations, manages grants effectively and ensures that the organization complies with financial requirements, and successfully completes government audits.

4. Meets with potential donors/funders on an “as needed” basis to address financial questions raised by these stakeholders.

Risk Management

1. Safeguards the organization’s assets, including the community fiduciary and brand trust.
2. Builds and maintains high levels of credibility for the Vice President of Finance position and staff under s/he management within the organization, the executive team, and board communities, and other external constituencies.
3. Develops and maintains systems of internal controls, including evaluating and implementation of financial policies, procedures and standards designed to preserve organizational assets. Ensures that the Enterprise Risk Management function is operating effectively to protect organizational assets.
5. Ensures compliance across the organization with governance requirements and applicable local and international regulatory laws, rules for financial and tax reporting, and UWW membership compliance and reporting – unafraid to take action where non-compliance is identified.

EDUCATION/REQUIREMENTS

- Bachelor’s degree
- CPA or equivalent work experience
- 5+ years of financial management experience in complex non-profit and/or for-profit sectors
- Background in complex organizations of commensurate size and scope.
- Extensive finance and cash flow management experience.
- Skilled at effectively presenting information and ideas to executive teams, volunteers, and board of directors.
- Passion for the mission and values of United Way.
- Ability to earn the confidence and respect of stakeholders.
- Recognized as a collaborative, motivational, supportive, and visionary leader.
- Outstanding interpersonal, coaching, and listening skills, with the ability to communicate positively within all levels of the organization.
- Demonstrated ability to remain objective, be discrete, and exercise common sense at all times. Able to develop strong, trusting relationships within department and organization.
- Thrive in a dynamic environment and able to work on various projects simultaneously, requiring strong organizational and time management skills.
- Track record of developing partnerships, building teams and managing conflict.
- Experience in strategic planning and execution.
- Recognized for both emotional intelligence and intellectual rigor.
- Committed to exploring new ideas and innovative approaches to solving problems.
- Possess a valid driver’s license and have use of insured motor vehicle.

Desirable, But Not Required

- MBA
- Previous experience in mid to large United Way Member organization.
- Understands the local community and the unique challenges and opportunities available.

OTHER DUTIES

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Direct Reports – Finance Assistant, Pledge Processing Manager, Finance Executive Assistant, Systems Administrator

Physical Requirements & Working Conditions

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit, talk and/or hear. The employee is frequently required to use finger and hand motion and occasionally to stand, walk, and reach with hands and arms. The employee must frequently lift and/or move up to 30 pounds and occasionally lift and/or move up to 40 pounds. There may be additional physical requirements associated with volunteer events. Specific vision abilities required by this job include close vision, distance vision, depth perception and ability to adjust focus.

Requires talking, hearing, and visual acuity sufficient to perform these major functions. Occasionally, the work of this position is spent at offsite meetings, or event locations within Lee, Hendry, or Glades County.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job operates in a professional office environment, off site venues, and outside event areas in various weather conditions. This role routinely uses standard office equipment such as computers, phones, and photocopiers.

This is a Full Time position. Days and hours of work are Monday through Friday. Evening and weekend events may be required as job duties demand.

United Way is an equal employment opportunity employer and does not discriminate against any person because of race, color, creed, religion, sex, national origin, disability, age, genetic information or any other characteristic protected by law. This nondiscrimination policy extends to all terms, conditions, and privileges of employment as well as the use of all company facilities, participation in all company-sponsored activities, and all employment actions. United Way will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in an undue hardship.

Terms of employment are subject to satisfactory negative drug testing as part of our drug-free workplace program. Background testing will be conducted because of the nature of the position. Applicants may be asked to take an online skills assessment.

Additional information:

- UWLHGO is an exceptional workplace that can provide you with:
- Opportunity to work with smart, passionate, and enthusiastic team members and volunteers
- Working with diverse staff and other constituents
- Culture of high-performance expectations and accountability
- Exciting and challenging work
- Opportunity to help solve the community's toughest problems
- Competitive pay that is commensurate with demonstrated successful performance and experience
- Paid Health and Dental Insurance for employee, 401K, and Monthly Accrued PTO