Job Description
Finance Director

Responsible to: President & CEO

Purpose of Position
The Finance Director, reporting directly to the President & CEO, is a results-driven, donor-focused leader and ethical financial professional with an understanding of the local community, business environment and United Way network. This position is responsible for ensuring the integrity of United Way’s financial position and performance, including management of all finance, accounting and investment activities. S/he has a relentless focus on the organization’s stewardship, transparency and accountability as critical to United Way Blackhawk Region’s mission and strategic objectives.

Duties and Responsibilities

1. Finance
   - Ensure compliance with all federal, state, and local laws and regulations, as well as applicable UWBR policies
   - Guide the organization’s commitment to accountability at all levels; collaborate to propose the adoption of plans, policies (i.e. appropriate debt and reserve levels) that ensure financial soundness and sustainability
   - Direct financial activities, including: short and long-range financial planning; revenue and cash flow forecasting; accounting; reporting; annual audit; investments; endowments; annual campaign and community grant analysis; and fraud-risk management
   - Manage various banking relationships and utilize banking products such as: online banking, ACH processing, credit cards, Positive Pay, gifts of stock, etc.
   - Oversee the Finance Assistant, whose critical responsibilities include: community grant allocations, designations, payables and accounts receivable, credit card processing and PCI compliance
   - Maintain equipment records, financial records (i.e. general ledger, internal controls docs, receivables, payables and payroll) and records retention
   - Administer the budget process (annual operating and capital expense) and guide staff in preparation of departmental budgets, applying zero-base budgeting technique, as well as historical cost data review for presentation to Finance Committee and Board approval
   - Monitor actual expenses against budget data and report to the President and Finance Committee potential concerns or material variance
   - Manage the flow of financial information to internal and external stakeholders, including: monthly, quarterly and annual financial reports for the Board; government reports / filings; financial document upload to United Way website
   - Utilize donor software alongside campaign and finance staff to spearhead the continuous improvement of information capture, data mining, pledge / results accuracy, donor receipts / acknowledgements, procedures for reporting, etc.
   - Serve as staff liaison to the Finance Committee
2. Administration

- Complete United Way Worldwide and United Way of Wisconsin reports and surveys in accordance with membership requirements
- Gather, interpret and use relevant data to drive strategy development and achieve desired results (i.e. Request for Proposal processes, revenue generation and cost conservation efforts, cost/benefit analysis, vendor negotiations, building management, etc.)
- Lead the organization’s efforts to attain/retain responsible stewardship accolades such as, Charity Navigator’s Four out of Four Star Rating and GuideStar’s Platinum Seal of Transparency
- Establish and monitor key performance metrics, as well as United Way network benchmarking and best practice sharing for finance/ administrative activities
- Process and maintain payroll, as well as serve as employee benefits coordinator
- Manage building maintenance contracts and coordination, i.e. cleaning, garbage, snow removal, utilities, tenants’ leases, etc.
- Serve as staff liaison to the Building & Property Committee

3. General

- Conduct operations effectively and efficiently and promote a cooperative spirit within the United Way Blackhawk Region organization
- Aid in the creation of the “ideal philanthropic experience” and exceptional customer service to generate trust of donors and stakeholders in United Way
- Deliver the United Way brand experience and promise
- Additional duties as assigned by the President

Desired Qualifications

- Bachelor’s degree in Accounting or Finance
- A minimum of five years progressively responsible experience in United Way financial management or related field/nonprofit
- Proven ability to analyze financial data and provide sound, effective and insightful recommendations
- Critical thinker, skilled multitasker, effective communicator, strong problem solving skills and consummate professional
- QuickBooks experience and/or employee benefits administration, a plus
- Valid driver’s license required, as well as access to reliable, insured automobile to be used for work-related travel throughout the Blackhawk Region
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 these essential functions.

- Ability to sit and/or stand for extended periods of time. Intermittent physical activity including bending, reaching and prolonged periods of sitting.
- Ability to lift light objects, usually no more than 8 lbs. in weight.
- Ability to utilize close vision, distance vision, peripheral vision, depth perception and ability to adjust focus.
- Ability to move about and communicate effectively with a diverse membership and employee group.
- Ability to accomplish the described responsibilities through the use of computers and technology.
- Ability to work in a changing, challenging and fast paced environment with varying stress levels.
- Ability to travel to other locations within the geographical area. Occasional business travel elsewhere may be required.

Equity

United Way defines equity as the intentional inclusion of everyone in society. Equity is achieved when systemic, institutional, and historical barriers based on race, gender, sexual orientation, and other identities are dismantled and no longer predict socioeconomic, education, and health outcomes.

United Way Blackhawk Region is an equal opportunity employer, we value and celebrate diversity. All applicants will be considered for employment regardless of race, religion, color, national origin, gender identity and expression, age, disability, veteran-status, familial, marital, or socio-economic status. To view our Diversity, Inclusivity and Equity webpage, click here.

As a champion for building strong and healthy communities, we promote an inclusive environment where everyone respects and values the contributions of all people and believe all people should have an opportunity to make an impact in society.