

Title:	Executive Financial and Operations Officer (Chief Financial Officer)	Group/Team:	Finance and Accounting Operations
Reports To:	President and Executive Officer	Status:	Full Time (37.5 hours)
FLSA Classification:	Exempt	Minimum Salary:	\$108,000/year

POSITION SUMMARY

As the Executive Financial and Operations Officer, you oversee all internal financial and accounting functions as well as oversee the operations team at the United Way of South Central Michigan.

An ideal candidate has the technical know-how and a heart for mission-oriented work. This includes a combination of strategic thinking, sophisticated financial management, and people-centered problem-solving that advances our work in the community. You have the ability to shape big picture thinking and meet strategic goals through actionable steps and on-the-ground implementation. You will be able to proactively analyze data and trends to inform organizational decision-making, garnering buy-in and support along the way.

UWSCMI is driven by our commitment to equity, diversity, and inclusion. The Executive Financial Officer models our values and collaborates to advance cross-functional strategies and priorities.

The Executive Financial and Operations Officer reports to the President/Executive Officer. As a member of the executive leadership team, you are responsible for helping to identify, shape, and realize the overall vision of the organization.

This position can work fully in-person or on a hybrid model. Our hybrid work schedule includes two days a week in-office on Tuesdays and Thursdays. This position can work out of the (a) Battle Creek, (b) Kalamazoo, (c) Jackson, or (d) Lansing offices. Routine travel within the region is required.

KEY RESPONSIBILITIES/ESSENTIAL DUTIES OF POSITION

- Contributes to an equitable, diverse and inclusive organizational culture that centers people in every solution, process and function.
- Oversees the preparation and communication of monthly and annual financial statements. Ensure the timely reporting of key financial data and updates to the CEO, Board of Directors, and other key stakeholders.
- Ensures legal and regulatory compliance regarding all financial functions. This includes tax planning and compliance with local, state, and federal tax regulations and coordinating 990 filing.
- Provides financial forecasting and planning, including multi-year forecasting.
- Leads collaborative strategic planning and initiative development and implementation related to finance, accounting, and operations functions.
- Manages and coordinates annual audit (including single audit as required) with third party auditing firm. Communicate audit findings to the executive leadership team and board including any updates to address risk management or internal controls.
- Grows the capacity and business plan for finance and accounting department to provide financial services to other United Ways and nonprofits.
- Implements sophisticated cash flow forecasting and management.
- Collaborates to develop and execute strategic plan for expansion of campaigns, programs, or funding sources.

- Plans for and adapts to complex transactions from development efforts, such as legacy gifts, private grants, and government grants.
- Revises budgets and works with programmatic leaders to ensure budgetary compliance and accuracy including restricted grant management and reporting for federal, state, and private grants.
- Identifies and implements investment strategies in collaboration with the Finance and Audit Committee of the Board including evaluation and regular contact with investment managers/brokers.
- Evaluates current treasury management, risk management, and audit partners and conducts periodic Requests for Proposals to ensure current services are values aligned, aligned with organizational priorities, and competitively priced.
- Provides strategic leadership to operations department ensuring equitable access, both physically and digitally, to develop and maintain efficient tools and processes that allows the organization to advance its mission. This includes integration of digital tools and resources to enhance performance and processes.
- Partners with President/Executive Officer and Director of Operations to develop master facilities plan and implement strategic priorities.
- Hires, manages, and develops an effective team that promotes equity, diversity, and inclusion. Assesses required competencies and partners with leadership team to support and develop staff to further the organizations mission. This includes creating a culture of belonging that sets clear expectations and shares and welcomes constructive feedback.
- Participates in key decisions as a member of the Executive Leadership Team.
- Continuously improves Finance & Accounting and Operations departments, including process improvements, internal control environment enhancements, and evaluation of the services provided to stakeholders and improvements to efficiency or quality of services provided.

DIRECTION OF OTHERS

Controller, AP/AR Associate, AP/Payroll Sr. Associate, Director of Operations, administrative staff (indirect supervision)

JOB REQUIREMENTS

- Demonstrates a commitment to equity, diversity and inclusion and ability to apply anti-oppressive and anti-racist principles in the workplace.
- Bachelor's degree in accounting, finance, treasury or a related field and 5+ years of senior-level accounting and financial management experience. A master's degree in accounting, finance, treasury, or a related field, CPA license, and experience in the not-for-profit or governmental sector is desired.
- High degree of experience with general ledger accounting software required. Experience with online general ledger account software, Acumatica, and NonProfitPlus, preferred.
- Strong adaptability and change management skills.
- High degree of experience and knowledge of Microsoft Office 365 including Word, Excel, Outlook, and PowerPoint, required; Teams and SharePoint, preferred.
- Demonstrates a comprehensive understanding of the financial considerations and complexities of not-for-profit accounting, including:
 - Progressive leadership in a finance or accounting function.
 - Ability to adapt the reporting packages, tone, and analysis to each audience, experience in multi-year forecasting and financial planning.
 - Ability to support operational changes and revenue diversification in organizations.
 - Ability to plan strategically for both the accounting and finance department and offer ideas for fiscal sustainability, revenue diversification, and resource management to executive leadership partners in each organization based on the needs and strategic plans of the organizations.

- Demonstrates an ability to provide leadership to collaborate with, and support operations department team. This includes co-creating strategic priorities for operations department functions including oversight and support of systems operations, physical plants, and technology.

WORK ENVIRONMENT AND PHYSICAL DEMANDS

- Ability to work in front of a computer for extended periods of time.
- Frequent sitting, standing, and walking.
- Reliable transportation for local travel. Use of a personal motor vehicle for transportation requires proof of insurance and the driver must have a valid Driver's license.
- Occasional work outside of normal business hours.
- Successful completion of a criminal background check.
- Candidate must be able to work successfully in a remote environment with private office space and high-speed internet.

SALARY

All the roles within UWSCMI have pay ranges that commensurate with the knowledge, skills, and abilities of the successful candidate. The minimum salary for this position is **\$108,000/year**

ABOUT UWSCMI

United Way of South Central Michigan (UWSCMI) gathers the power of three legacy organizations—Capital Area United Way, United Way of the Battle Creek and Kalamazoo Region, and United Way of Jackson County—to mobilize financial and volunteer resources, partners, and voices, creating equitable and lasting change for the most vulnerable people in our communities.

Our vision: Strong, caring communities where every person is valued, thriving, and connected for the common good.

Our path: Our work lifts our local communities by reducing racial and economic disparities; addressing the needs of ALICE (Asset-Limited, Income Constrained, Employed) households in financial stability, education, health, and basic needs; and creating opportunities for every person to reach their full potential.

EQUITY, DIVERSITY, AND INCLUSION

UWSCMI is committed to dismantling systemic inequities that continue to cause harm for Black, Indigenous, and other People of Color (BIPOC), Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) people, women, and people with disabilities. We believe that these communities must be centered in the work we do. We strongly encourage applications from people with these identities or who are members of other marginalized communities. Together, we will continue to build capacity and accountability into our policies, practices, and partnerships.

NOTE

All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

BACKGROUND CHECK DISCLOSURE

We require background checks for certain roles. The checks are completed by ProScreening and results are only ever communicated to the Hiring Manager if they may impact someone's employment. We do not use prior



arrests, only convictions. These convictions will only be considered as hiring criteria if they are directly connected to the roles & responsibilities of the job (for example, financial related convictions for a finance officer). We know that the criminal justice system is not equitable, and negatively impacts marginalized communities - specifically people of color - at rates much higher than other identities. This is why our background check process is only in place for explicit situations.

TOTAL REWARDS PACKAGE

United Way of South Central Michigan (UWSCMI) offers a competitive total rewards package including a competitive salary, medical coverage with an employer contribution of 90% towards single coverage and 75% towards dependent coverage, dental and vision with a 90% employer contribution towards single and dependent coverage, life insurance with an employer-paid benefit of 2 times annual salary, short-term disability and long-term disability effective the first of the month following hire. In addition, UWSCMI provides a 10% employer contribution, deposited monthly, into the 403(b) retirement plan each year with full vesting after 3 years of service and 20 days Paid Time Off, 13 days Paid Sick Time, 5 Paid Volunteer Days, 3 Floating Holidays and 11 Paid Holidays each year (Paid time off, sick time. Paid volunteer time and floating holidays are prorated the first year). Hybrid and/or remote work arrangements are available for many positions.

TO APPLY:

Submit your application online via <https://unitedforscmi.org/careers/> by March 10, 2024.

United Way of South Central Michigan is an Equal Opportunity Employer committed to the principles of equity, diversity, and inclusion.