



Guardian Finance and Advocacy Services is committed to Equal Employment Opportunity and diversity, equity, and inclusion. Qualified candidates from underrepresented populations are encouraged to apply.

Title: Chief Operating Officer

Summary: Guardian Finance and Advocacy Services is a nonprofit corporation that provides a complete network of public fiduciary services. Working from our offices in Battle Creek and Kalamazoo, our professional and compassionate staff of 30 people work to improve the lives of over 1200 clients in southwest Michigan. We seek a passionate person who enjoys a challenge to join our team.

Based in Battle Creek, this full-time position is responsible for managing all operations and assets for the Corporation and its clients. This position also acts on behalf of the Executive Director and the Board in the Executive Director's absence.

This position is predominantly an in-house position, and the ideal candidate would be able to work in the office during our business hours. Guardian Finance and Advocacy Services is committed to honoring the home lives of our staff members and flexibility. Limited remote work and daily schedule flexibility are available.

Specific Responsibilities:

The person in this position is ultimately responsible for overseeing and/or delegating the following duties:

- Provide oversight of all agency operations, including programs, finances, and facilities.
- Provide oversight to all corporate financial functions, including the annual budgeting process and audit.
- Design and implement policies and procedures to safeguard the agency and client assets.
- Coordinate with vendors to troubleshoot IT concerns, improve technology resources, and implement improvements.
- Provide daily supervision to the following staff: bookkeepers, Intake/Discharge Specialist, Front Desk, and VA, including but not limited to evaluation, monitoring, assisting, and directing fiscal staff daily.

- Oversee the investment of corporate funds, including a review of corporate investments and accounts.
- Develop, maintain, and monitor systems, practices, and procedures for improving service and operational efficiency.
- Develop, maintain, monitor, and report statistical data on computerized systems, including general ledger, payroll, accounts payable, accounts receivable, and account reconciliations.
- Provide audit support annually.
- Client and vendor 1099 tax reporting annually.
- Oversee personal representative client files.
- Oversee client trust accountings.
- Function as an active member and participate in CEO meetings, staff meetings, departmental meetings, board committee meetings, and board meetings.
- Assist all supervisory staff concerning specific requests for solutions to day-to-day administrative problems and approve, if necessary, deviations from policy/practice based on specific client/agency needs
- Assist the Board and the Executive Director in developing, implementing, monitoring, and reporting management policies/procedures.
- Provide statistical/financial analysis of data in the development of cost structure, utilization, reimbursement, billing rates, and similar reports on program activities, as well as provide sound management recommendations for improving or altering existing program activities based on data analysis.
- Provide input for the development of the annual budget.
- Prepare analytical and statistical reports as requested.
- Accounting tasks, including but not limited to:
 - Approve all corporate bills in Bill.com daily
 - Post bank deposits
 - Post payroll bi-weekly
 - Post contract billing monthly
 - Post fiduciary billing quarterly
 - Reconcile the Miscellaneous Expense account in QB monthly
 - Reconcile all A/R accounts in QB quarterly

- Reconcile all corporate bank and investment accounts monthly
 - Prepare client banking analysis monthly
 - Prepare metrics reports monthly
 - Prepare client FOH monthly
 - Initiate bank ACH file as needed.
- Other duties/projects as assigned by the Executive Director.

Qualifications:

- BA/BS in a business or human services field and 4 years of relevant accounting experience preferred; MA/MS in a business or human services field and 1 year of relevant accounting experience preferred. This includes a working knowledge of generally accepted accounting practices and financial reporting at the Board level.
- Experience with computerized accounting systems, word processing, spreadsheets, and relational databases.
- Ability to represent the agency and Board professionally.
- General knowledge of Conservatorship, Guardianship, Payeeship, and similar legal appointments/authorities preferred.
- Ability to handle multiple tasks and prioritize such tasks.
- Excellent organizational, analytical, and communication skills.

This description is intended to indicate the kinds of tasks and levels of work difficulty that the incumbent will be required to perform. It shall not be held to exclude other duties of a similar nature, which may be requested by the supervisor but not specifically mentioned.

Compensation: This position's salary range is \$50-\$58,000 to start, based on experience. Guardian Finance and Advocacy Services provides an excellent benefits package with a generous PTO policy and holiday schedule.

Interested candidates should submit a resume and cover letter to Jennifer Warnos at Jwarnos@yourguardian.org. Applications will be accepted until the position is filled.