

Summary

Job Title: Finance and Operations Director

Department: Operations

Description: The Finance and Operations Director requires a broad skill set to successfully manage a wide variety of administrative and operational functions for the organization. Key responsibilities include financial management, human resources and benefits, organizational and programming support and coordination, and board and nonprofit compliance.

Reports to: Leader Valley Executive Director

Status: Exempt, .8 FTE - 1.0 FTE

Salary: \$65,000-80,000- commensurate with experience

This job description identifies the major responsibilities of this position. Employees may be required to perform other duties as assigned, to assist with executing the organization's business model, promoting the organization's culture, mission and values.

KEY RESPONSIBILITIES

Financial Management

- Collaborate with Director of Fundraising to meet the organization's financial and sustainability priorities, revenue generation, and diversifying our fundraising model
- Assist with establishment and operations of the Financial Trustee Group and endowment in conjunction with the Executive Director and Executive Committee
- Collaborate with Director of Fundraising to review monthly and annual financial reports; Create, analyze, and present financial dashboards and reports in an accurate and timely manner; clearly communicate monthly and annual financial statements; collate financial reporting materials for all donor segments, send donor pledge statements, and oversee all financial, project/program and grants accounting
- Ensure financial compliance and reporting, including annual financial review and Form 990, tax preparation and filing, donor tax communications
- Oversee and lead annual budgeting and planning process in conjunction with Executive Director; administer and review all financial plans and budgets; ensure accuracy of budget codes and designations; monitor progress toward short-term and long-term financial goals
- Oversees all organization loans, bank accounts, CDs, and other financial obligations
- Manage bookkeeping tasks, including, but not limited to account payables, accounts receivable, invoices, past due statements, managing and recording deposits, monthly bank reconciliation, managing fund allocations, and maintain donor records
- Attend to vendor contracts and billing
- Update and implement all necessary business policies and accounting practices
- Assist with grant research, budgets, applications, management, and reporting

Human Resources

- Partner with Executive Director for recruitment, interviewing, selection, hiring and on-boarding process of new employees, as well as offboarding; Ensures equitable practices that are consistent and streamlined

- Oversee salary administration, payroll, and benefit deductions
- Ensure payroll information (including time sheets, time off requests), expense reports, and mileage reports are completed accurately, approved, and turned in by deadlines
- Evaluate, select, and negotiates benefits options with outside vendors to maximize value for employees
- Coordinate with plan providers to efficiently administer the organization's insurance and benefits plans, including, but not limited to health, dental, vision, 401K, life insurance
- Ensure that requests for unpaid time off, borrowed PTO, schedule adjustments, accommodations, and expenses outside of the approved budget should follow the protocol outlines in the Employee Handbook
- Create and update an employee handbook; Establish, execute, and monitor employment policies and compensation plans, ensuring compliance with human resources-related regulations and legal requirements
- Manage day-to-day employee human resource needs
- Assist in establishing a review process for employees and ensure reviews are completed on schedule for each team member, review and compensation are accurate, consistently and effectively communicate employee standing within the organization
- Encourage, identify, and budget for professional development opportunities for team members to meet organization and personal goals
- Meet with the Executive Director and Executive Committee regarding opportunities to support staff and program goals

Organizational and Programming Support and Coordination

- Provide administrative support for education and business programming, including, but not limited to registration, contracts, calendar management, venue registration, certificates, materials prep, and client follow up
- Create programming and operations workflow systems to increase team effectiveness and enhance client experience
- Coordinate facilities management including office space, secure and maintain liability insurance, manage business services for the efficient operation of the organization
- Oversee various internal and organization projects as needed, to ensure accurate messaging and timely execution
- Support, attend, and actively participate in various Leader Valley events, workshops, team sessions
- Coordinate technology services, equipment, AI integration
- Manage day-to-day operations of the organization and ensure that general administrative office needs are met

Board and Nonprofit Compliance

- Monitor compliance with foundation bylaws and internal policies
- Assist with Council meeting scheduling, preparation, and documentation
- Ensure proper documentation and reporting of the organization for compliance, including biennial reporting at the State, as well as conflict of interest forms
- Prepare Memorandum of Understanding with key partners

Core Values

Servant Leadership

- Believes leadership is for everyone
- Models positive leadership
- Focuses on the strengths of others and creates opportunities for them to display their leadership
- Possesses a heart for serving others

Human Connection

- Believes in the power of diverse relationships
- Balances courage and consideration in relationships and situations
- Listens empathically
- Exhibits high trust behaviors
- Celebrates differences and seeks out diverging viewpoints

Integrity

- Believes authenticity is best and character matters
- Practices what we teach
- Values doing what is right
- Is a responsible steward of resources

Lifelong Learning

- Believes learning is an ongoing journey
- Possesses a growth mindset
- Is coachable and resourceful
- Invests in the development of others

Facilitate Change

- Believes challenges are opportunities to improve
- Recognizes needs as they emerge
- Embraces and proactively responds to change
- Is solutions-oriented and takes initiative

QUALIFICATIONS

The ideal candidate possesses the following educational and professional experience:

- Required- Bachelor's degree in business
- Required experience in the following related roles: finance/accounting, human resources, operations, executive assistant, and/or office management
- Preferred understanding of nonprofit financials, budgeting, and forecasting
- Preferred understanding of nonprofit management and compliance
- Proven ability to lead and partner effectively with results-oriented team
- Demonstrated strong initiative, organization, prioritization, follow through, and attention to detail
- Ability to communicate financial concepts to programmatic and fundraising colleagues without finance backgrounds
- A successful track record in setting priorities and creating systems; keen analytic, organization and problem-solving skills which support and enable sound decision making
- Excellent communication and relationship building skills with an ability to prioritize, negotiate, and work with a variety of internal and external stakeholders
- The ability to wear many hats on a small team in a fast-paced environment
- Strong cultural fit with the organization's core values and nonprofit mission

APPLICATION PROCESS

Please submit the following application materials:

- 1) Letter of application addressing:
 - a. your interest in this role
 - b. how your skills, dispositions, and preparation have equipped you for this role
 - c. how you align to the Leader Valley values noted above
- 2) Resume showcasing your unique experience and impact
- 3) A minimum of 3 current professional references

All applications materials must be submitted in full by April 17, 2024 for consideration. Please submit application materials electronically to: Dr. Melissa Reade, Leader Valley Executive Director, melissa@leadervalley.org
