



UNITED WAY OF GREATER ROCHESTER AND THE FINGER LAKES
JOB DESCRIPTION:

United Way
of Greater Rochester
and the Finger Lakes

FINANCE DIRECTOR

SUMMARY

Reporting directly to the Chief Financial Officer, the Finance Director manages the accounting system and financial function of the organization. This includes the production of periodic financial reports that comply with generally accepted accounting principles, coordinate with outside auditors, maintain an adequate system of accounting records and a comprehensive set of internal controls designed to mitigate risk and enhance the accuracy of the company's reported financial results for United Way of Greater Rochester and the Finger Lakes and its subsidiary UWGR Holding Company; United Way Services Corporation and its LLC.

ESSENTIAL FUNCTIONS

Accounting and Financial Reporting:

- Oversee operations of the Finance Department including the Cash Management, Accounts Payable, Purchasing, Fixed Assets, Debt Management and General Ledger functions. This includes oversight of these fiscal services provided to outside organizations and projects.
- Develop and maintain timely and accurate financial statements and reports that are appropriate for the users and are in accordance with generally accepted accounting principles (GAAP). These include but are not limited to: internal and external monthly financial statements for United Way of Greater Rochester and the Finger Lakes, Inc, UWGR Holding Company; United Way Services Corporation, Systems Integration of Monroe County, LLC, 403(b) Thrift Plan of UWROCFLX and the UWROCFLX Defined Benefit Pension Plan.
- Coordinate and lead the annual external and internal audit process, workers compensation audit and other audits as applicable.
- Prepare and monitor financial metrics for quarterly strategic planning reports; Board and related committee reports, and measurement with Charity Navigator and UWW metrics.
- Review payroll processing and tax compliance to ensure the accuracy and timely payment of wages, benefits and payroll taxes.
- Oversee the grant financial function including all financial, project/program and grants accounting; ensure that expenditures are consistently aligned with grant and program budgets throughout the grant/fund period voucher filings and compliance with specific grant financial requirements. Recommend overhead rate annually.
- Understand the annual operating and campaign allocation budget; provide financial forecasts as needed.
- Oversee the preparation of all supporting information for the annual audits and IRS filings (990, 990T and 5500 reporting).
- Ensure all financial reports, general ledger entries, etc. are adequately documented. **Internal Controls and Compliance**

- Maintain and ensure compliance with a documented system of accounting policies and procedures including internal controls that verify the integrity of all financial information and ensures assets are protected.
- Monitor compliance with all statutory requirements including charitable status, local, state and federal government reporting, and tax filings.
- Maintain compliance with United Way Worldwide Standards set for the network.

Cash Management

- Oversee the Cash Management function supported by the Assistant Controller – Grants & Treasury Management.
- Oversee and track the performance of invested assets in keeping with policies and investment guidelines.

Contract Management

- Create contracts using standard agreements provided by legal counsel (e.g., independent contractors, grant agreements, commercial co-venture agreements, etc.).
- Review external contracts and seek legal assistance as necessary. Present results to the CFO for final approval.

Volunteer Management

- Assist the CFO in facilitating engagement with Board and related committees on financial matters, including discussions on relevant issues and trends. Prepare Board and related committee meeting materials for the CFO's review.
- Examine meeting minutes to verify their accuracy in reflecting the proceedings and activities conducted during the meeting. **Insurance**
- Responsible for overseeing the insurance function, updating policy information, obtaining insurance certificates, and filing claims. **Supervision**
- Leverage strengths of the direct report finance team members. Help clarify roles and responsibilities and develop and implement training programs in order to maximize and reach optimal individual and organizational goals. Provide guidance, direction, and mentorship to team members to foster their professional growth.
- Set clear performance expectations, objectives, and goals for direct reports, and regularly assess their progress.
- Foster a positive and collaborative work environment within the team, encouraging open communication and teamwork. Collaborate and work with entire finance team.
- Provide leadership to a fast-paced department through motivating and guiding staff, promoting excellent communication throughout the organization; create and promote a positive and supportive work environment.
- Monitor and evaluate the performance of direct reports, providing constructive feedback and recognition as appropriate.
- Lead by example, demonstrating professionalism, integrity, and accountability in all interactions and tasks.

- Collaborate with HR on matters related to recruitment, hiring, onboarding, and performance management of direct reports. **Other**
- Work with a variety of internal and external stakeholders
- Manages special projects as assigned by the CFO
- Consistently demonstrates the values and mission of United Way
- Performs other duties as assigned
- Represent United Way at external events on occasion
- This position may have the ability to work a hybrid in-person/remote schedule after the first 90 days of employment.

SKILLS AND COMPETENCIES

- Ethical conduct
- Personal effectiveness/credibility
- Highly organized with keen attention to detail, the ability to manage multiple priorities, and established deadlines
- Proficient with data analysis, critical thinking, and problem-solving
- Proficient in basic office and accounting software programs
- Demonstrated ability to understand intricate details while maintaining a strategic, big-picture perspective.
- **Leadership Experience:** Demonstrated ability to lead and inspire teams towards achieving organizational goals. This includes experience in setting strategic direction, making critical decisions, and driving initiatives forward.
- **Managerial Skills:** Proven track record of effectively managing and developing teams, including hiring, training, coaching, and performance management.
- **Industry Knowledge:** Expert-level understanding of accounting and finance principles, including knowledge of relevant trends, regulations, and best practices. Also includes excellent understanding of governmental guidelines that impact the organization.
- **Financial Acumen:** Expert-level understanding of financial principles and practices, including budgeting, forecasting, and financial analysis.
- **Communication Skills:** Excellent verbal and written communication skills, with the ability to effectively communicate with stakeholders at all levels of the organization.
- **Strategic Thinking:** Ability to think strategically and translate vision into actionable plans and initiatives. Experience in developing and implementing strategic plans to drive business growth and innovation.
- **Problem-Solving Skills:** Strong analytical and problem-solving abilities, with a track record of identifying issues, developing solutions, and driving resolution.
- **Relationship Building:** Proven ability to build and maintain relationships with internal and external stakeholders, including clients, partners, and colleagues.
- **Change Management:** Experience leading organizational change initiatives and managing transitions effectively.

FLSA CLASSIFICATION: Exempt

United Way of Greater Rochester and the Finger Lakes

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REPORTS TO: Chief Financial Officer

SALARY RANGE: \$115,000 - \$135,000 annually

* The expected rate of pay for this position is shown above. Compensation offers are based on a wide range of factors including relevant skills, training, experience, education and, where applicable, licenses or certifications obtained. Market and organizational factors are also considered.

SUPERVISORY RESPONSIBILITY

Supervises a team of six individuals in the accounting department, with direct oversight of two direct reports.

TRAVEL

Local travel may be required on an occasional basis.

EDUCATION AND EXPERIENCE

Bachelor's degree in accounting from an accredited program with at least 10 years of experience in public and/or private accounting, including at least 5 years in a supervisory capacity; or equivalent combination of education and experience. Majority of the above experience in financial and operations management preferred. CPA license preferred.

APPLY HERE: Posting Link https://recruiting.myapps.paychex.com/appone/MainInfoReq.asp?R_ID=6279694

JOIN THE TEAM!

United Way of Greater Rochester and the Finger Lakes is a dynamic and collaborative work environment comprised of dedicated professionals who are driven to make our community a better place. Join our team and make an impact serving our region with your time and talent.

MISSION

Our mission is to unite the goodwill and resources of our community so that everyone can thrive. That means that our team is committed to working with local donors, businesses, not-for-profit program partners, municipalities and individuals to make this region stronger and more vibrant together.

VALUES

Our core values define who we are and how we serve our community. United Way and our team members are caring, collaborative, equity-driven, innovative, respectful, results-oriented and trustworthy. United Way strives to ensure employees and external partners feel valued, connected, and empowered.

CULTURE STATEMENT

We are committed to creating a welcoming environment that embraces, values, respects, and encourages people to show up as their authentic selves to produce their best work. Together we ensure that processes,

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policies, and practices foster fairness, belonging, and equity that reflect the views and values of all people within all levels of our organization.

WHAT WE OFFER

- Competitive financial and wellness benefits
- Generous paid time off, retirement plan, and other fringe benefits
- Hybrid working arrangements
- Opportunities to give back to the community in life-changing ways
- Paid professional development
- Team events and internal committees for connection opportunities and fun!

This job description lists only the responsibilities and qualifications deemed essential to the position in support of the ADA. Reasonable accommodations may be provided to enable individuals with disabilities to perform the essential functions. United Way of Greater Rochester and the Finger Lakes is an Equal Opportunity Employer. This policy prohibits discrimination based on sex, race, color, religion, creed, national origin, age, marital status, sexual orientation, gender expression, disability, genetic predisposition, veteran status, or status as a member of any other protected group or activity.