



Finance Manager Position Profile



United Way
of Broome County





OUR MISSION

To drive change that will have positive impact on the critical needs of our community by strategically leveraging the collective resources of community partners.

Financial Leadership Opportunity

FINANCE MANAGER Broome County, NY

Financial Position

This position serves as the Financial Manager for United Way of Broome County, an organization with a multi-million dollar annual budget. This position collaborates with senior management to provide strategic direction for the development and operation of the organization's Finance and Donor Services. The successful candidate must possess excellent organizational, communication, teamwork and management skills. Responsibilities include cash management, internal and external financial reporting, pledge-related activities, management of multiple budgets, and the establishment of multi-year budgeting to enable the organization to make timely, proactive and knowledgeable business decisions related to operations.

Our total revenue from memberships, grants, contributions, earned income and other sources exceeded \$3 million in 2016. Additionally, a group of visionary supporters from this community came together more than sixty years ago and established an endowment fund for our United Way. Through careful management and strategic investment, these funds donated have grown to a level that we use a portion of the annual earnings to offset all of our administrative and overhead costs and also to support program funding. The organization is in solid financial condition.

OUR VISION

We are well organized and flexible to meet the ever changing needs in our community and create social change that produces healthy, well educated and financially stable individuals and families.

OUR VALUES

We maintain accountability and transparency by being ethical stewards of investments and take responsibility for an inclusive environment of the UWBC organization and the communities that we engage.

We demonstrate a commitment to and respect for diversity and inclusiveness in everything we do and value all people that we interact with in our relationships.

We embrace innovation through empowerment of our staff, volunteers and community supporters and foster openness in communication and creative solutions.

We are honest and ethical in our work and trustworthy in our commitment to deliver a high level of quality service. We take responsibility for delivering high value and relevant results for the service we manage.

We commit to a culture that values:



Respect

We recognize each individual's time, work, knowledge, and commitment to our organization.

We always assume positive intent and strive for self-awareness.

We embrace an inclusive, diverse, and culturally competent community.



Transparency

We hold ourselves and each other accountable.

We offer positive and constructive feedback.

We are a culture of integrity that stands with and supports one another.



Communication

We are open-minded and practice active listening.

We recognize continuous, open communication as an essential part of trust and understanding.

We encourage individuality and celebrate our team in moving our mission forward.

ADDITIONAL INFORMATION



The Finance Manager position is a full-time, exempt position that reports to the Senior Director of Operations and Development.

COMPETENCIES/ABILITIES:

Direct the financial operations of the organization which include yet are not limited to:

- Financial Accounting with respect to day to day management of all fiscal operations
- Manage the development of multi-year budgets for the Organization and all programs/grants
- Analyze costs for all business lines and work with management to integrate strategies into United Way's business planning activities
- Review and update allocations and inter-company transfers
- Long and short term financial forecasting
- Prepare monthly journal entries, financial analysis, and financial statements
- Provide, by established due date, all information for annual audits including work papers list and draft of financial statements
- Overall management of budgeting cycle
- Prepare annual financial statements and other required finance reports
- Ensure the use of appropriate and accurate accounting practices. Recommend policies and procedures that increase efficiencies, provide effective internal controls and reduced costs and assist with implementation
- In collaboration with Senior Management, maintain relationships and negotiate terms for services with banking institutions
- Provide oversight of risk management, property and casualty insurance. Review all contracts for insurance requirements and request certificates of liability as needed, ensuring adequate coverage is provided
- In collaboration with Senior Management, provide analysis regarding financial feasibility of changes to benefits and analysis of salary and benefit projection
- Record investment activity monthly for all investments in the general fund, endowment fund, trust fund, and third party trust
- Work with Finance Committee and Investment Committee to provide oversight of long-term investments in the Endowment and Trust accounts
- Review bi-weekly payroll, along with quarterly and year end payroll tax reports
- Prepare 990, 1099, 1096 reports and related NYS filings
- Review financial policies and update as necessary

MANAGEMENT & SUPERVISION

- Direct supervision of the Finance Associate and Bookkeeper
- Respond to external and internal requests and inquiries in a timely and professional manner
- Supervision of all Vita team volunteers

ACCOUNTABILITY:

- Ability to provide detailed and timely analysis of current issues and provide recommendations to the Senior Management Team
- Expertise in all aspects of finance and accounting. In-depth knowledge of accounting procedures and regulations, particularly those involving non-profit organizations. Skilled at investment management and risk management including insurance, taxation issues and regulation, and audit procedures
- A wide knowledge of financial, business, and management issues. Ability to collect and evaluate varied information, facts and data to perform detailed analysis of financial statements
- Ability to develop financial strategies and negotiate favorable banking agreements
- Strong, team-oriented management skills obtained through significant experience with senior managers. Ability to generate ideas, establish direction, and obtain commitment from staff
- Skilled in making formal and informal presentations dealing with complex financial information that creates a positive impact with internal and external audiences.
- Ability to listen effectively and respond quickly during Board of Director and Finance Committee meetings
- Actively communicate with staff
- Ability to understand and apply complex financial and business concepts. Effective in integrating information from a wide variety of sources to design financial solutions. Adept at keeping track of financial details and able to translate internal reports and procedures for external audiences.

INTERACTION:

- Establish and maintain strong working relationships with staff, volunteers, contributors, agencies, members of the Board of Directors, and Finance and Investment Committees
- Demonstrate a comprehensive understanding of all United Way operations; represent the organization at appropriate, community and business events



LIVE UNITED

ABOUT THE POSITION



MINIMUM QUALIFICATIONS

- BA degree in Accounting
- Experience in not-for-profit management
- Demonstrated decision making skills using creative problem solving and analytical skills to provide resolution
- Accomplished at working in a complex and dynamic environment where there are competing needs and limited resources
- Excellent communication skills, including group facilitation, presentation, listening, & writing skills
- Excellent client relation/interpersonal skills
- Self starter, highly motivated, takes initiative, excellent follow-through skills
- Ability to work well under pressure
- Knowledge of United Way campaign activities
- Excellent computer skills including, but not limited to Microsoft Excel, Word, and QuickBooks
- Strong commitment to the United Way mission and vision
- Supervisory experience necessary

COMPENSATION & BENEFITS

Salary commensurate with experience and qualifications. An excellent employee benefits package includes:

- Vacation, Personal and Sick Time
- Medical, Vision and Dental Insurance Available
- Retirement plan
- Long-term disability insurance
- Short term disability plan
- Group life insurance

LIVING AND WORKING IN BROOME COUNTY, NY



- **Superb Quality of Life**
- **Affordable Housing**
- **Exceptional Educational Opportunities**
- **A High Level of Volunteerism**
- **Natural Beauty of Rivers, Parks, and Lakes**
- **Professional Sports**

Broome County is located in the Southern Tier Region of New York State. The area consists of the Triple Cities of Binghamton, Endicott and Johnson City surrounded by suburban and rural towns.

Located in the heartland of New York State, Broome County consists of lively cities, and quaint villages. The area is proud of its many beautiful parks and outdoor recreation centers. The confluence of the Susquehanna and Chenango Rivers help sculpt the landscape with lush scenery and a variety of wildlife. Two Interstates and a major state route connect Broome County to most points in the Northeast.

Classic historic architecture give Binghamton and the surrounding areas of the Southern Tier its unique character. New urbanism, cluster developments and modern-day planners long to recreate neighborhoods that we already have enjoyed for a century or more.

Broome County has a superb quality of life to offer its residents and visitors. Our area is bursting with exceptional festivals and events, and a variety of area attractions provide unique experiences year round. Enjoy all avenues of fun in Broome County, from playing sports, exploring nature, creating art, browsing an array of excellent stores and shops to observing zoo animals, riding carousels and visiting museums.

There is an exciting line-up of recreation and sporting events each year full of action-packed competitions such as the Dick's Sporting Goods Open Champions Tour Event and the Levene, Gouldin and Thompson Tennis Challenger Tournament as well as professional teams and top notch athletic facilities. When it comes to the arts, there's no shortage here! Whether visiting the plethora of art galleries, admiring the historic architecture, enjoying some amazing cuisine from one of the many locally owned restaurants, or joining the audience to enjoy a world class performance, our rich local culture is sure to impress!

Together, the educational institutions of Broome County are a source of pride for area residents and an asset to the sustained economic development of the community. Binghamton University, SUNY Broome Community College, and Davis College are highly regarded and add to a talented and productive workforce in Broome County.

Renowned as the birthplace of IBM, our largest current employers are nationally known companies such as Lockheed Martin MST, BAE Systems, the Raymond Corporation, and IBM. The county is also home to many businesses involved in the flight-simulation and training industry.

Three hospitals are located in the area, each with primary care centers scattered throughout the community. They include Our Lady of Lourdes Hospital; and two operated by United Health Services: Wilson Memorial Hospital and Binghamton General Hospital.

**For more information, please visit:
www.GreaterBinghamtonChamber.com**



TIMING & APPLICATION

Formal background checks will be conducted on finalists for the position.

CONTACT INFORMATION

Please submit resumes or any inquiries to:

Susan Hughes, Finance Associate

United Way of Broome County

PO Box 550, Binghamton, NY 13902

Email: finance@uwbroome.org