



United Way of Story County

## Job Description Finance Director

### **Position Summary:**

The Finance Director at United Way of Story County is responsible for overseeing all financial operations, including budgeting, reporting, forecasting, and compliance. This role manages accounts, donations, and payroll processes while ensuring adherence to accounting principles and tax regulations.

### **Position Responsibilities and Duties:**

#### **1. Financial record keeping**

- a. Maintain accurate and up-to-date financial records, including the United Way of Story County (UWSC) organizational budget; UWSC granting and allocations programs; UWSC endowments; and awarded local, state, and federal grants.
- b. Ensure compliance with accounting principles and standards.
- c. Implement and oversee internal controls for financial transactions.
- d. Coordinate review of UWSC partner agency and other community partner audits, Form 990s, and other financial reports in conjunction with Board Treasurer and Finance Committee.

#### **2. Budgeting and financial reporting**

- a. Develop and manage annual budgets.
- b. Monitor budget variances and provide regular reports to President and CEO and Board Treasurer.
- c. Forecast future financial needs and trends.
- d. Present financial information to leadership and board members.
- e. Prepare and report monthly, quarterly, and annual financial statements.
- f. Prepare and report necessary financial (grant spenddown and other related) reports to local, state, and federal agencies.
- g. Prepare and maintain United Way of Story County granting program financial tracking and reporting process.
- h. Prepare and report quarterly endowment reports.
- i. Provide analysis and insights on financial performance.

#### **3. Accounts management**

- a. Oversee and implement accounts payable and receivable processes.
- b. Reconcile bank statements and financial accounts.
- c. Manage cash flow and optimize working capital.

#### **4. Donation management**

- a. Process and record incoming donations.
- b. Ensure proper allocation of restricted and unrestricted funds.
- c. Generate donation receipts and acknowledgments.
- d. Partner with Resource Development team to ensure aligned donation tracking between QuickBooks and Blackbaud Raiser's Edge (donor CRM).

## 5. Compliance and accountability

- a. Coordinate with external auditors for annual audits.
- b. Prepare necessary documentation for audits.
- c. Implement recommendations from audit findings.
- d. Ensure timely filing of tax returns and other required financial reports.
- e. Stay updated on relevant tax laws and regulations.

## 6. Financial software management

- a. Maintain and optimize financial management software systems.
- b. Ensure data integrity and security of financial information.

## 7. Maintenance of personnel and payroll records

- a. Maintain current employee payroll information.
- b. Process all payroll records and submit to payroll processor.
- c. Partner with payroll processor to report and pay monthly, quarterly, and annual payroll taxes.
- d. Partner with payroll provider on processing payroll benefits (insurance, retirement, time off, flex) and withholdings; provide payroll processor updated eligibility and elections.
- e. Research and review payroll benefits (insurance and retirement) as needed.
- f. Work with payroll processor to provide accurate information for the Workers Compensation Insurance and audits.
- g. Provide accurate information for the completion of Form 5500 for the pension plan.

### **Job Requirements:**

**Physical Requirements:** Sedentary work is exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push or pull or otherwise move objects.

**Physical Activity:** Fingering is picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling. Talking is expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly or quickly. Hearing is the ability to receive detailed information, through oral communication.

**Visual Acuity:** Work utilizes computer terminal and verification for accuracy of written material.

### **Employment Classification:**

Full-Time; Professional Exemption; Salaried. Salary commensurate with professional experience and education.

### **Qualifications:**

- **Education:**
  - **Required:** Associate's degree in accounting or related field.
  - **Preferred:** Bachelor's degree in accounting or related field.
- **Professional Experience:**
  - **Required:** Minimum of two years in accounting, bookkeeping, technical management, or financial database management.
  - **Strongly Preferred:** Demonstrated proficiency with QuickBooks.
  - **Preferred:** Financial management in nonprofit fundraising.

- **Skills:**
  - **Required:**
    - Strong organizational and technical abilities.
    - Proficient in budget development/management and financial analysis.
    - Excellent verbal and written communication skills.
    - Ability to make timely decisions and work effectively under pressure.
    - Capable of communicating effectively with co-workers, volunteers, donors, agencies, and the general public.

**Benefits:**

- Comprehensive health coverage, including employer-paid premium for medical (PPO), dental, and vision insurance
- Medical Flexible Spending Account (FSA)
- Generous paid time off, including:
  - 10 paid holidays per year
  - 3 weeks of vacation (accrued annually; additional vacation accrual commensurate with years of service)
  - 13 personal days (accrued annually)
- Retirement plan with employer match (4% match after one year of employment)
- Life insurance equal to annual salary
- Long-term disability coverage
- Flexible work arrangements:
  - Hybrid schedule with one remote day per week
  - Infant-at-Work program
- Mileage reimbursement for work-related travel

**Job Relationships:**

Reports to: United Way of Story County President and CEO  
 Supervises: Verification volunteers

**Application Process:**

To apply, **please submit the following to [unitedway@uwstory.org](mailto:unitedway@uwstory.org):**

1. Cover letter or professional summary
2. Resume

**Important Notes:**

1. **Direct submissions to the email address, [unitedway@uwstory.org](mailto:unitedway@uwstory.org), are required.**
2. **Applications through third-party platforms (e.g., LinkedIn's "Easy Apply") will not be considered.**
3. Documents must be saved in PDF format and include "Finance Director" and the applicant's First & Last Name in file name.

*United Way of Story County (UWSC) is committed to hiring a diverse workforce and promotes a working environment that is racially, ethnically, and culturally diverse. UWSC is an equal opportunity employer.*