

**ORANGE COUNTY UNITED WAY
JOB DESCRIPTION**

TITLE: CHIEF FINANCIAL OFFICER	REPORTS TO: CHIEF EXECUTIVE OFFICER
DIVISION: EXECUTIVE	FLSA CLASSIFICATION: EXEMPT

PURPOSE OF POSITION:

To provide strategic financial leadership of Orange County United Way (OCUW) and to oversee the Accounting, Information Technology, Facilities, and Human Resource functions. Provide staff leadership of the Finance and Audit committees and support to the Board of Directors, and other volunteer committees as required.

Incumbent will be directly responsible for providing financial leadership of OCUW's strategic planning process, preparation of the annual operating plan (budget), financial reporting, resource requirements of the accounting and IT organization; safeguarding OCUW's financial and non-financial resources; establishing and maintaining adequate systems of internal accounting controls; ensuring adherence to organization's financial policies; ensuring appropriate technology is in use; oversee human resources and recruitment, and provides staff leadership to volunteer committees as required.

Under the direction of the Chief Executive Officer, lead designated staff and volunteers in the support of Orange County United Way's mission.

MAJOR AREAS OF RESPONSIBILITY:

- Directly responsible for providing financial & business leadership to OCUW.
- Oversee Finance and Administration strategies that will ensure organizational goals and objectives are met with particular emphasis on financial accountability.
- Lead the organization in the preparation of the annual operating budget.
- Routinely prepare cash flow forecasts and monitor actual performance against the forecast.
- Oversee OCUW's investment portfolio in conjunction with guidance from the Finance Committee and investment advisor.
- Ensure all financial & business reporting is timely, and accurately prepared in accordance with GAAP and OCUW financial reporting standards.
- Plan and oversee the completion of the annual independent audit.
- Ensure all reporting to United Way Worldwide is done accurately and timely.
- Oversee IT organization, systems, policies and practices.
- Staff the Finance and Audit committees.
- Oversee and manage the human resources division.
- Oversee and manage the stewardship of our building and other assets.
- Serve as a member of the Executive Team and Senior Leadership Team.
- Support and participate in opportunities for mentoring and teambuilding with direct reports to ensure a high performing, focused team. Ensure the development of his/her staff to achieve the effective foundation for a high performing team.
- Perform other job related duties as assigned.

CORE COMPETENCIES:

All employees, in performing their respective tasks and duties, are to perform quality work within deadlines, with or without direct supervision; interact professionally with other employees, customers, and suppliers; work effectively as a team contributor on all assignments; and work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

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Interpersonal Skills - Maintains confidentiality; listens to others without interrupting; remains neutral and unbiased; remains open to others' ideas and tries new things.

Oral Communication - Speaks clearly; listens and obtains clarification; responds well to questions; participates in meetings.

Written Communication - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information.

Language Skills - Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization.

JOB REQUIREMENTS:

Minimum of 7-10 years of senior financial management experience. Background should include experience working in an organization with revenues in excess of \$25 million. Bachelor's Degree required; MBA preferred; Acceptable fields of study would include Business Administration, Management, and Finance. The emphasis must be in Finance or Accounting. Non Profit experience is helpful.

EMPLOYMENT STANDARDS:

Knowledge of:

- Organizational management and leadership principles and practices
- Current Financial Accounting Standards relevant to for-profit and non-profit organizations.
- Organizational strategic planning.
- Management trends and techniques – both with staff and volunteers.
- Automated accounting systems.
- Technology management.
- Facilities Management.
- Non workplace fundraising strategies, including endowment and planned giving.

Skills in:

- Budgeting and fiscal management.
- Cash flow and cash projection analysis.
- IT systems, hardware, data bases and applications.
- Determining strategic financial policies.
- Working collaboratively on organizational, financial or technological issues.
- Developing and leading a high performing, focused team.
- Business Process Improvement & Reengineering of financial operations.
- Analyzing and solving extraordinary problems.
- Dealing with staff, donors, volunteers with tact and diplomacy.

Ability to:

- Develop and work with complex financial and statistical information.
- Provide leadership to, recruit, manage, develop, motivate and organize both staff and volunteers.
- Rapidly and accurately provide strategies and leadership to organization.
- Form strong and positive work relationships with diverse groups of people.

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- Develop and execute short and long range organizational and divisional strategic plans.
- Analyze and understand statistical and financial reports.
- Develop and maintain ongoing working relationships with all departments within the organization
- Determine developmental needs of staff and how to provide for those needs.

COMPENSATION

- Commensurate with experience, education, and market – \$200,000 – \$250,000; competitive benefits.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is frequently required to be able to remain in a stationary position 75% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, records, and office machinery. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine and computer printer. Occasionally ascends/descends stairs, and constantly positions self to maintain computers in the office, including under the desks. The person in this position frequently communicates with coworkers and customers who have inquiries about our business operations and the community we service; therefore, the person must be able to exchange accurate information. The employee must occasionally lift and/or move up to 25 pounds.

Send Resumes To:

recruiting@unitedwayoc.org

Orange County United Way
18012 Mitchell South, Irvine, CA 92614

www.unitedwayoc.org