



## UNITED WAY OF VENTURA COUNTY Position Description

**Position Title:** Vice President, Finance and Administration  
**Department:** Finance and Administration  
**Report To:** President and CEO  
**Type:** Full-Time, Exempt, Permanent  
**Date Revised:** March 2024

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**ABOUT US:** United Way is advancing the common good in Ventura County by providing help today in ways that strengthen tomorrow. United Way has the scope, expertise and influences to bring together human services agencies, government, businesses, private foundations and dedicated volunteers around a common vision of creating maximum impact and achieving long-lasting results. Why United Way? We all want to have the greatest possible impact on our community and the issues that we care about. Join the movement. At United Way, you unite your hopes and strengths with others to accomplish more than any of us can alone.

### **POSITION SUMMARY:**

As a key member of the executive senior management team, the Vice President of Finance and Administration will work closely with the President and CEO on financial policy and direction while being an active participant in the organization's overall strategy. Responsible for financial matters to ensure accountability and proper administration in accordance with generally accepted accounting principles, legal and other regulatory standards, grant requirements, and nonprofit business practices. Direct and oversee the finance, accounting, budgeting, treasury, risk management, human resources, payroll, benefit administration and IT efforts of the organization. The Vice President of Finance and Administration works in collaboration with other departments including the Resource Development team providing guidance to meet strategic goals, as well as Community Impact to assist with grant tracking deliverables and allocations.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES** include, but are not limited to:

- Establish and implement short- and long-range finance, human resources and IT department goals, objectives, policies, and operating procedures. Establish critical measures, monitor financial performance and develop solutions to business challenges.
- Provide timely and accurate analysis of financial reports, budgets and financial trends for effective communications with internal management, the Finance Committee, Audit Committee, Investment Committee, and the Board of Directors.
- Act as lead staff for Finance/Audit/Investment Committee. Keep Finance Committee apprised of organization's financial condition, including areas of fiscal stewardship, financial performance, investment policies and performance, and adequacy of reserves. Engage the Committee around issues, trends and changes in the organization's operating model and operational delivery.

### **OTHER DUTIES/RESPONSIBILITIES:** Strategy:

- Partner with the President and CEO on operational and strategic issues; provide strategic recommendations based on financial analysis and projections, cost identification and allocation, and revenue/expense analysis in conjunction with mission-based work.
- Participate in ongoing strategic planning process as an integral member of the senior management team; engage with senior leadership to align financial management with short- and long-term financial planning and projections.



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- Develop finance organizational strategies by contributing financial and accounting information, analysis, and recommendations to strategic thinking and direction; establish functional objectives in line with organizational objectives.

### **Financial and Operational Management:**

- Ensure timeliness, accuracy and usefulness of financial and management reporting for decision-making that mitigates risks and results in strong financial performance.
- Ensure effective internal controls are in place and in compliance with generally accepted accounting principles and applicable federal, state and local regulatory laws and rules for financial reporting and IRS 990 filing.
- Ensure effective treasury operations through strong cash management practices and appropriate product solutions.
- Ensure timely and quality processes for audits, tax returns, and other compliance reporting as appropriate.
- Enhance and/or develop and implement finance, risk management, human resources, and IT-related policies and procedures by way of systems that will improve the overall operation and effectiveness of the organization. Seek full range of business solutions.
- Engage other members of senior management team to facilitate cross-department collaboration that ensures financial and IT services positively support the organization's evolving strategy, operational delivery and data collection needs.

### **Professional Development:**

- Develop and manage direct staff; guide larger multi-disciplinary teams outside of direct span of control. Evaluate finance, human resources and IT division structures and team plans for continual improvement and employees' professional development.
- Update knowledge by remaining apprised of new regulations, new technologies and new business practices. Educate others on financial matters by providing financial advice and sharing knowledge for continual improvement.
- Maintain relationships with investment community and professional organizations. Act as primary contact for banks, insurance companies, audit firms and other vendors.

### **MANAGEMENT AND SUPERVISION:**

Oversee the operations of United Way of Ventura County's finance and administrative staff.  
1 Direct report, 1 Indirect.

### **EDUCATION REQUIREMENTS:**

The ideal candidate will have a Graduate Degree in Accounting with a CPA certification preferred.

### **EXPERIENCE REQUIREMENTS:**

Preferably 5 years as a Controller or senior-level finance or accounting position in a nonprofit environment. Additionally, the candidate will have the following skills/knowledge:

- Demonstrated excellence in managing finance, accounting, budgeting, control and reporting at a nonprofit organization.
- Knowledge of finance, accounting, budgeting, and cost control principles including Generally Accepted Accounting Principles.
- Experience in strategic planning and execution. Strong analytical skills and experience interpreting a strategic vision into an operational model.
- Skill in examining, developing, reengineering and recommending financial, and technology systems, policies and procedures.



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- A collaborative and flexible style, with a strong service mentality, and who is seen as a team player committed to lifelong learning.
- Strong commitment to developing team members. Ability to motivate teams to produce quality materials within tight timeframes and simultaneously manage several projects.
- Demonstrated commitment to the social sector with a passion for the organization's mission.
- Recognize and be responsive to the needs of all stakeholders of the organization, including donors, volunteers, and community constituents.
- Work requires willingness to work a flexible schedule.

### **UNITED WAY CORE COMPETENCIES FOR ALL STAFF:**

- **Mission-Focused:** Catalyze others' commitment to mission to create real social change that leads to better lives and healthier communities. This drives their performance and professional motivations.
- **Relationship-Oriented:** Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven:** Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Brand Steward:** Steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.

### **PHYSICAL REQUIREMENTS:**

- While performing the duties of this job, the employee is occasionally required to stand, walk, sit, use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms, climb stairs, balance, stoop, kneel, crouch or crawl, talk or hear, taste or smell. The employee must occasionally lift and/or moves up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.
- Primarily works in climate controlled office-based setting.
- The employee is exposed to weather conditions prevalent at the time.
- The noise level in the work environment is usually moderate.

**COMPENSATION: \$80,000 to \$90,000 per year DOE with generous benefits.**

**Send Cover Letter and Resume to:**

**United Way of Ventura County**  
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Ventura, CA 93003  
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