

UNITED WAY OF SOUTHERN VANCOUVER ISLAND
JOB DESCRIPTION

Position: Director, Finance and Operations

Reports to: Executive Director

GRID: Excluded Position

Job Summary:

The Director of Finance and Operations (DFO) has primary responsibility for overseeing all budget and fiscal functions, policies and procedures. The DFO also oversees human resource functions including labour relations, IMIT and systems, procurement, and operations. The DFO demonstrates solid process and fiscal management skills, knowledge of non-profit and fund accounting, and a working knowledge of human resource laws and best practices. The DFO is a seasoned professional with specific expertise in fiscal management and fund accounting, human resource law and best practice, nonprofit management and governance, and IT/operations management. The DFO has excellent written and oral communication skills, and a keen interest in UWSVI's mission.

The Director of Finance and Operations (DFO) reports to the Executive Director and interacts with the Board Finance Committee Chair on fiscal and investment matters.

The DFO is a member of the senior leadership team and helps to set long term direction for the organization, integrate work across business units, and steward the confidence of donors and partners. The incumbent has a collaborative leadership approach, contributing significantly to a culture that is inclusive, supportive, and oriented to stakeholder engagement, high performance, community impact, and innovation.

Summary of Duties and Responsibilities:

- Work with the Executive Director and the management team to create annual strategic goals, and develop and execute tactics in support of the business plan
- Lead the Finance and Operations team, including: hiring, training, development and performance management
- Guide the effective delivery of financial and accounting functions and reporting; forecast and long-term budget modelling; audit and compliance processes
- Provide timely management accounting information to the Board of Directors, Finance Committee of the Board, CEO, United Way Centraide, donors, funding partners, and UWSVI leadership team
- Ensure that all funds, physical assets and other property of UWSVI are appropriately administered and safeguarded
- Prepare annual financial statements and working papers for the annual audit
- Confirm compliance with all government agencies by completion of GST, EHT, WCB remittances, annual Charities Return and various funder reports
- A key focal point in labour relations and oversight of collective agreement
- Provide expertise in cost and financial analytics to influence decisions on goals, initiatives, and services
- Provide financial analysis/expertise/advice to Leaders and/or projects throughout the organization to ensure that operating decisions are based on sound business principles and to assist in the achievement of business objectives consistent with the strategic plan
- Ensure financial, human resource, and IMIT policy is current, and policies are reviewed on a regular basis to ensure they reflect current business practices
- Trend analysis for business performance, economic factors, industry performance, and markets to contribute to corporate and financial forecasting and client analysis. Provide revenue forecasting and analysis to support the business outlook for the company to Executives
- Collaborating with colleagues to create and foster a working environment that promotes equity, diversity, and inclusion
- Oversee UWSVI's investments to ensure they are properly managed and generate the expected return
- Lead the development of the risk management control plan and risk mitigation
- Oversee payroll, benefits administration, recruiting, onboarding, off-boarding, employee check-ins and exit interviews, and other human resource needs
- Responsible for all human resources (HR) functions including hiring practices, employee review policies, professional development, and other HR activities
- Assure compliance with applicable HR, employment laws and Collective Agreement requirements
- Maintain updated personnel and operations policies and procedures and ensure compliance
- Oversee management and maintenance of all office systems and facilities

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- Develop and oversee document retention policies and manage disposal of records
- Develop and oversee risk assessment and emergency planning policies and procedures
- Oversee organizational insurance policies and ensure organization is adequately covered
- Ensure emergency and security policies and procedures are understood and followed, including cyber-security procedures
- Oversee compliance with Provincial and Federal registration and reporting obligations, including charity registrations and requirements

Education and Experience

- University degree in Business or Accounting, or an equivalent combination of education
- CPA designation or equivalent is required
- 7+ years of progressively responsible financial experience
- 2+ years in a Not-for-profit (NFP) environment is strongly preferred, with sound knowledge of NFP accounting standards highly beneficial
- Demonstrated financial management experience, including budgeting, electronic banking, reporting and analysis, and full cycle financial operations
- Experience with investment fund management is preferred
- Labour relations experience is an asset
- Experience in planning, developing, implementing, and monitoring financial controls, policies and procedures
- Experience of CRM systems and functions including, processing, system roll overs, and database maintenance
- Experience in leading change in financial management

Knowledge, Skills and Abilities

- Strong analytical, problem-solving, and decision-making skills with the ability to identify trends, establish benchmarks, and provide credible analysis and business recommendations
- Excellent interpersonal, oral, and written communication skills, as well as presentation skills, to be able to connect with and influence a diverse group of individuals with varied levels of financial/business backgrounds
- Excellent leadership skills with the ability to build effective teams, motivate key employees, inspire confidence in others, and coach and encourage success
- Ability to tackle items independently while also being collaborative and thoughtful with all team members
- Advanced knowledge and experience in the use of Microsoft Excel to organize, utilize, report and model financial information
- Practical knowledge of payroll management
- Knowledge of privacy requirements and systems security

United Way Competencies

Mission-Focused

The UWSVI's top priority is to create real social change that leads to better lives and healthier communities.

Relationship-Oriented

The incumbent understands that people come first and is astute in cultivating and managing relationships toward a common goal.

Collaborator

The incumbent understands the roles and contributions of all sectors of the community can mobilize resources through meaningful engagement.

Results-Driven

The incumbent is dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.

Leadership Competencies

Talent Management and People Development

- Builds and leads a diverse team that enables organization to succeed; hires right people; demands high performance and results; ensures people's work is aligned with mission and strategy.
- Open to new ideas; invests time and resources in training, development, and succession for the department; identifies and grooms high-potentials staff; delegates effectively.
- Coaches and mentors employees and teams.
- Receives and provides feedback in a constructive way that builds confidence among staff; addresses performance problems.

Business Acumen and Strategic Direction

- Understands business of the organization and effectively creates strategy.
- Understands the community and its business environment.
- Understands general business and financial principles required to effectively lead, manage, and align resources for performance; able to read financial statements, create budgets.
- Contributes to the bottom line by helping the organization grow its resources and capacity.

Operational Planning and Execution

- Establishes effective and efficient processes that align their department priorities with greater organization goals, strategy, and mission.
- Collaborates effectively within organization.
- Inspires and motivates people.
- Engages volunteers in a way that helps execute the strategy.

Outward Turning

- Develops strategic relationships to benefit UWSVI and the community; knows key players in community and is diligent in maintaining and expanding the network of partners.
- Seeks learning from inside and outside the network to build skills, knowledge, and abilities to challenge the organization in reaching its potential.
- Effective spokesperson for UWSVI and its work.
- Is present and visible in community and with partners (donors, volunteers, etc.); engages, listens, and understands community aspirations.
- Establishes credibility as a leader on critical issues and solutions affecting the community.

Finance Competencies

Financial Acumen

The DFO possesses a high-level of broad financial and management skills and is effective at stewarding the financial resources of the organization, including financial reporting, forecasting, and trending. Fosters an environment that encourages fiscal responsibilities.

Strategic Business Partner

In partnership with Executive Director and other members of executive management team, the DFO develops and drives execution of organizational strategies and actions. DFO provides leadership in an ongoing assessment of organizational financial performance against both the organization's budget and its short and long-term strategy.

Fiduciary Officer

The DFO acts in the best interest of the organization to ensure that organization complies with all financial and tax regulations, safeguard the organizational operations from financial and operational risks, and ensures that organization adheres to United Way Membership Requirements (which includes all applicable local, provincial, and federal laws and regulations). The DFO communicates and enforces policies and procedures, establishes and monitors internal controls, as well as implements and maintains effective financial reporting and cash management procedures.

Enterprise Risk Manager

The DFO plans and implements measures that will avoid and/or mitigate the negative impact of actual and potential risks to the organization. Develops and manages systems to assess business enterprise risks and drive integration and standardization of risk management processes/procedures across the organization.

United Way Southern Vancouver Island is a unionized workplace. This position is excluded from union membership. Salary and benefits for this position are competitive and based on skills and experience.