

SOAR Fox Cities, Inc.
Empowering people with differing abilities.

POSITION DESCRIPTION

POSITION TITLE: Associate Executive Director of Finance & Operations
REPORTS TO: Executive Director
STATUS: Exempt
Full-Time: 40 hours/week

Introduction

At SOAR Fox Cities, we envision a world where all individuals are seen for their ABILITY, not their disABILITY. We offer a variety of services including Youth, Adult and Family Programs, Advocacy, Community Education, and the third largest Special Olympics program in the state.

We are an IRS designated 501(c)3 nonprofit organization located in Appleton, Wisconsin. Within the walls of our offices and throughout the community, we aim to do just what our name says: Help our members and participants SOAR above the barriers their varying abilities may create. We strive for inclusivity and have made it our goal to create a world where everyone has the opportunity to succeed and contribute their page in the larger story of life.

SOAR Fox Cities is lead and operates with the following Vision, Mission, and Values in mind:

Vision:

- A community where all individuals can be actively involved and have opportunities to maximize their potential.

Mission:

- Empowering people with differing abilities.

Values:

- Advocacy: We champion the needs and concerns of individuals and their families.
- Community: We serve as a resource for the community and provide activities that promote the participation of individuals and their families in the larger community.
- Integrity: We conduct ourselves in a way that is honest, fair, transparent and ethical.
- Life-long learning: We view learning as an activity that engages and enriches individuals over the course of their lives.
- Respect: We honor and celebrate the differences in ourselves and others.
- Positive relationships: We recognize the power of positive relationships, providing opportunities to make human connections and supporting the development of life skills that contribute to strong relationships.

Position Summary

The Associate Executive Director of Finance & Operations (AEDFO) is responsible for overseeing the financial and related administrative operations of the organization including budget management, financial reporting, monitoring cash flow, developing and maintaining best practices and internal controls for organization finances and operations, human resources functions directly related to finance (i.e. benefit enrollment,

management, and reporting), facilities management, and computer and technical systems management. The AEDFO will also serve as a general compliance officer in collaboration with the Executive Director to ensure all functions of the organization including those noted above are executed in alignment with the agency's strategic plan, contractual agreements, and legal requirements.

The AEDFO will work closely with and oversee the work of an outsourcing partner in the area of finance and payroll with the ultimate goal of pulling some financial functions, including elements of general bookkeeping, back to in-house status. Furthermore, the AEDFO coordinates financial compliance, the annual audit, budget development and monitoring.

The AEDFO participates as a member of the Leadership Team to formulate and implement policies and plans to meet the organization's short- and long-term objectives and may assume responsibility for the organization in the absence of the Executive Director. The AEDFO serves as a resource for the SOAR team in the area of finance, including the development of budgets for grant writing and reporting purposes, operational systems, and policies and protocols that support the agency's mission and meet best practice standards.

Capacity of the Role

This is a full-time role with SOAR Fox Cities and is housed at our home office located at 211 E. Franklin Street, Suite A, Appleton, WI 54911. SOAR business hours are Monday through Thursday 9:00am – 4:30pm with the office being closed for business on Fridays. This position is full-time, exempt at 40 hours per week. There will be some flexibility in scheduling; however due to this role's relationship with office operations and systems, the generally expected hours worked in-office will be Monday thru Thursday 9:00am-4:30pm.

Major Responsibilities

- In collaboration with the Executive Director, oversee financial operations including execution of financial strategies and processes including annual operating budget, annual audits, 990 tax preparation support, and ensuring all applicable forms/reports are filed with State & Federal entities.
- Serve on the Senior Leadership Team guiding management and oversight for office operations, policy development and implementation, and facilities management practices.
- Coordinate financial functions, including banking, A/P, A/R, invoicing, investments and investment strategies, and preparation of monthly financial reports in accordance with General Accepted Accounting Principles (GAAP).
- Oversee third party billing/invoicing functions executed by the Accounting Clerk, filling in where necessary and working to develop relationships with third party payers where appropriate (MCO's, IRIS, DHS, other contracted entities, etc.).
- Manage contract commitments and expenditures to ensure consistency with budgeting as well as contractual compliance.
- Oversee payroll and employee benefits, including accrued vacation, health plan, insurance, retirement funding, health savings account, transportation benefits, and other benefits as appropriate.
- Oversee employee recruitment and onboarding with SOAR staff and contractors as appropriate and/or designated by Executive Director.
- Provide support to the Executive Director for overall operations.
- Provide support to the SOAR Board of Directors, including support to the Finance Committee, Audit Committee, and Board Treasurer, including committee meeting leadership and attendance.
- Manage SOAR's accounting procedures including development and implementation of standard operating procedures ensuring to every extent possible appropriate segregation of financial duties.

- In collaboration with Building Manager and Condo Association, oversee management, operations, and maintenance of office space, equipment, technology and operating systems (i.e. phones, security, etc.).
- Provide assistance in the search for additional operational space to accommodate future growth.
- Provide supervision to finance and operations staff including Member & Office Support Specialist and Accounting Clerk.

Seasonal Duties and Responsibilities

- Attends and assists at agency-wide fundraising, program, and community events as part of the SOAR Fox Cities Leadership Team.

Additional Duties and Responsibilities

- Assist in office telephone/receptionist duties and other group efforts when needed/available.
- Will assist with fundraising and grant writing from budget development and reporting perspectives.
- Attends continuing education opportunities provided by SOAR.
- Performs other duties as assigned by the Executive Director.

Required Qualifications

- Bachelor's Degree in accounting, business management, or related field **required**. Advance credentials such as CPA highly desired.
- Minimum of 6 years direct experience managing and executing financial management functions, budgeting, administrative systems, annual audits, Form 990 processes, and other financial processes and requirements. Direct experience in a nonprofit setting highly desired.
- Highly proficient in Quickbooks and financial management practices.
- A strong understanding of accounting and office operations and procedures, including finance related human resources functions, payroll, bookkeeping, A/R and A/P functions, invoicing, contract management, and compliance with federal, state and local regulations and laws related to nonprofit corporations.
- Management experience supervising staff, managing budgets, and effectively handling multiple priorities and projects.
- Excellent communication skills, both internal to the organization and with external partners, in writing and verbally.
- Proven ability to build and nurture a diverse, respectful and positive working environment and to coach supervisees, as well as peers.
- Demonstrated ability to work independently, keep organized in a fast-paced, fast-growing environment, manage simultaneous tasks and adjust strategy to changing demands.
- Demonstrated attention detail.
- Ability to meet deadlines and to work independently and as part of a team.
- Demonstrated commitment to diversity within the office and using a person-centered approach that values all individuals and respects differences regarding race, ethnicity, gender identity, and expression, sexual orientation, religion, disability, and socio-economic circumstance.
- Commitment to working collaboratively and respectfully toward resolving obstacles and conflicts.
- Experience working with individuals living with varying abilities and their families desired, but not required.

- Knowledge and experience working with third party payers such as Management Care Organizations (MCO's), IRIS, insurance companies highly desired, but desire and drive to learn, should experience be absent, is necessary.
- Flexibility, creativity, and a passion for promoting inclusion and empowerment for individuals with disabilities.

Additional Requirements

- Valid driver's license and access to reliable transportation.
- Background check will be required.

WORK ENVIRONMENT

The work of AEDFO may take place in a variety of settings, but will most likely be centered around the primary office of SOAR located at 211 E. Franklin Street in Appleton. Some travel between sites/different locations will be necessary as the organization is looking to expand and create additional operational sites. Flexibility in scheduling, including evenings and weekends, may be required to accommodate organization needs and activities. Noise levels may vary depending upon location/activity. Some lifting, bending, and carrying of items/materials will be necessary and one should expect be able to lift at least 20lbs.

GENERAL

This position description defines the general nature and level of work performed by the employee assigned to this position. It does not state or imply that these are the only duties and responsibilities assigned to the job. The employee may be required to perform other job-related duties as requested by the Executive Director or the Board of Directors. All requirements are subject to change over time, and to possible modifications to reasonably accommodate an individual with developmental disabilities.

JOB DESCRIPTION ACKNOWLEDGEMENT FORM

I have received a copy of the job description for my position:

Position: Assistant Associate Executive Director of Finance and Operations

I have reviewed this job description and I understand all my job duties and responsibilities. I am able to perform the essential functions as outlined. I understand that my job may change on a temporary or regular basis according to the needs of my location or department without it being specifically included in the job description. If I have any questions about job duties not specified on this description that I am asked to perform, I should discuss them with my immediate supervisor.

I further understand that future performance evaluations and merit increases to my pay are based on my ability to perform the duties and responsibilities outlined in this job description to the satisfaction of my immediate supervisor.

I have discussed any questions I may have had about this job description prior to signing this form.

Employee signature

Date

Employee Name (Print Please