



United Way  
Monterey County

**Position:** Vice President of Finance  
**Reports to:** President and CEO  
**Type:** Full Time, Permanent, Exempt Position

### **Summary**

The Mission of United Way Monterey County (UWMC) is to engage the community and focus resources to improve lives in Monterey County. The Vice President of Finance oversees all fiscal operations of United Way Monterey County, including development and coordination of budgets, audits, grants, contracts, monthly financial reporting, general accounting and human resource functions.

### **Scope of Work:**

#### ***Accounting & Record Keeping***

- Ensure timely and accurate recording of all financial transactions.
- Responsible for all financial management of federal grants and contracts, as well as private and local government grants and contracts, including invoicing, tracking of expenses, receipt of payments, and compliance with grant requirements.
- Timely reconciliation of all bank and investment accounts, as well as transfers between various accounts as necessary.
- Maintain United Way Monterey County payroll processing, accounts payable, designation payouts, accounts and grants receivable, pledges receivable, and general ledger, including the Combined Federal Campaign.
- Supervise Donor Database and Finance Manager.

#### ***Financial Reporting***

- Provide President and Board of Directors with accurate and timely financial reports and analyses.
- Prepare monthly financial statements and cash forecasts, pledge revenue and payment analyses.
- Review and execute all contracts and insurance policies, including compliance with grant requirements.
- Oversee donor designation payments and information for acknowledgements.
- Prepare and coordinate with external audit firm all financial information and reports necessary for timely and accurate annual audits and the applicable Federal and State tax filings.
- Serve as professional staff assigned to the Finance Committee, Executive Committee and Board, recommend changes in procedures and reporting functions.
- Other assignments requested by the President and CEO.

#### ***Human Resources Administration***

- Maintain personnel records for all employees.
- Administer employee benefits as specified in the personnel policies.
- Assist in the evaluation and selection of benefit providers.
- Enroll employees in benefit programs.
- Maintain records of employee vacation and leave of absence time used.

- Develop and maintain the employee handbook.

### **General United Way Competencies:**

- *Mission oriented:* Performance and professional motivations are driven by a commitment to creating real social change that leads to better lives and healthier communities.
- *Relationship oriented:* Understands that people come before process and is astute in cultivating and managing relationships toward a common goal. The ability to build, leverage, and maintain mutually positive relationships that provide support for and add value to United Way, and the community.
- *Collaborator:* Ability to cooperate/collaborate with customers and stakeholders to clearly define their objectives to identify solutions that solve their needs and lead to increased revenue. 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. The capacity to be energized and excited by challenging objectives and a concern for exceeding goals set by self or others; achieve high level, sustainable performance.
- *Brand Steward:* Steward of the United Way brand and understands his/her role in growing and protecting the reputation and results of the organization and greater network.

### **Position Specific Requirements:**

- Well organized, self starter, detail oriented, globally observant, pro-active, critical thinker.
- Strong comprehension of operations and accounting, including financial reports and database management.
- Exceptional time management, written and verbal communication skills. Must be able to multi-task and prioritize in accordance with changing deadlines and priorities.
- Computer literate with experience in MS Office software including Word, Excel, and Outlook. Abila accounting and Andar fundraising database softwares a plus.
- Working knowledge of efficient filing systems, office machines and equipment.
- Ability to make sound independent decisions based on available data.
- Ability to work with a variety of personalities in a collaborative manner.

### **Qualifications:**

- Bachelor's degree in Business, Finance or Accounting
- Five years related experience and/or the equivalent combination of education and experience. Nonprofit experience desirable.

**Benefits:** Benefits include healthcare, dental, vision, retirement plan, disability, life and generous paid time off and holiday policies.

To Apply: Interested applicants are encouraged to submit a cover letter and resume by email to [Tina.Engquist@unitedwaymcca.org](mailto:Tina.Engquist@unitedwaymcca.org)

*United Way Monterey County is an Equal Opportunity Employer.*

*Revised 8/10/21*