



SENIOR DIRECTOR OF FINANCE

OPPORTUNITY GUIDE

OUR CORE VALUES

- Equity
- Integrity
- Collaboration
- Community
- Compassion
- Results



ABOUT UNITED WAY

OF SOUTH-CENTRAL MICHIGAN

United Way of South-Central Michigan (UWSCMI) mobilizes financial and volunteer resources, partners, and voices, to create equitable and lasting change for the most vulnerable people in our communities. Its creation is the result of the power of three legacy organizations—Capital Area United Way, United Way of the Battle Creek and Kalamazoo Region, and United Way of Jackson County being merged in 2022. Bringing over a century of trust, know-how, and partnership to change lives in meaningful lasting ways, United Way tackles complex issues within the community that no single organization can solve alone.

Serving 6 counties, UWSCMI develops focused strategic impact goals specific to the region. These goals will address the most pressing social issues in the regional communities, in particular those related to financial instability among marginalized and underrepresented people.

THE MERGER

On April 1, 2022, Capital Area United Way, United Way of Battle Creek Kalamazoo Region, and United Way of Jackson County merged to become United Way of South Central Michigan. Gathering the history and power of the three legacy United Way's has allowed for new sources of funding, new partnerships, and the ability to advocate for racial and economic equity more effectively.

YEAR 2 ACHIEVEMENTS

- Created \$24M in local and regional impact
- Defined regional Vision, Mission and Values
- Engaged in advocacy in Washington D.C supporting key basic needs legislation.
- Earned several WMPRSA awards in Communication and Equity
- Led two, 21-Day Equity challenges, and actively took part in Pride events

EQUITY COMMITMENT/WORK

Committed to pushing back against the significant, ongoing harm caused by systemic racism, UWSCMI has a strong foundation for continued growth and improvement in the Equity, Diversity, and Inclusion (EDI) space. EDI practices are embedded throughout the departments within UWSCMI, and the staff is committed to growth and improvements through goal setting and learning.

Guided by their internal equity values, UWSCMI works alongside the community to build a more equitable future. With the belief that every person deserves the opportunity to pursue the life they want, UWSCMI ensures that its partners, programs, and investments equitably address the community's needs. By listening, learning, and changing, they become a stronger and more effective advocate and partner by dismantling inequitable systems.



THE OPPORTUNITY: SENIOR DIRECTOR OF FINANCE

United Way of South-Central Michigan seeks a financial leader to serve as the Senior Director of Finance (Senior Director). Functioning as the Controller with additional leadership responsibilities, the Senior Director reports to the President and Executive Officer and serves as a member of the UWSCMI Executive and Big Leadership Teams to support the organization’s financial management and ensure integrity, accuracy, and timeliness of information. With a strong commitment to Equity, Diversity, and Inclusion, this position will further impact the mission of UWSCMI and the communities it serves.

With post-merger changes still settling in, and some systems changes that need to still be redefined, the Senior Director will develop, and manage policies and procedures to provide structure and organization to the finance department, with the ultimate goal of supporting all departments with their financial management needs. The primary source of revenue is restricted donations through the annual United Way campaign, and the primary form of outgoing funds is via 100 programs at more than 90 nonprofits. Both pledge management and grant accounting drive the work of the finance team. UWSCM operates with a budget of \$5M, with a total budget of \$18M and total assets of \$27M.

The four-person finance team (including the Senior Director) joins with 40+ other teammates to deliver the overall mission. In addition, there are currently outsourced functions of systems-level policy and process development, strategy, pledge processing, and General Ledger support. Over time, the Senior Director will determine the appropriate level of in-house/outsourced support.





PERFORMANCE

OBJECTIVES

FINANCIAL MANAGEMENT AND ACCOUNTING

- Demonstrate fiscal responsibility, integrity, and efficient use of all organizational resources.
- Develop an annual operating budget and ensure the organization operates within budget guidelines. Regularly monitor budgets and cash flow statements, monitor variances, and issue regular reporting on annual progress to date.
- Manage performance of all accounting functions, policies, procedures, and standards, including payroll, disbursements, and annual audits.
- Protect assets by establishing and maintaining adequate internal controls and assuring proper risk management protocols and insurance coverage.
- Oversee and manage the full lifecycle of financial grants, including proposal development, budget creation, compliance monitoring, financial reporting, and timely disbursement of funds to ensure alignment with organizational objectives and donor requirements.
- Produce materials, reports, and analyses for the Executive Leadership Team (ELT), department heads, Finance and Audit Committee and/or Board of Directors, and other financial partners.
- Develop and maintain strong relationships with external vendors, including partnerships with banks, brokers, current outsourced functional partners, and vendors. Monitor and ensure the most favorable terms and conditions govern all accounts to the benefit of United Way and the agencies it serves.

ORGANIZATIONAL MANAGEMENT AND TEAM LEADERSHIP

- Collaborate with the Executive Leadership Team members to discuss financial results, plan the financial implications of new projects, and define work toward longer-term objectives.
- Lead, develop, motivate, supervise, and maintain a highly effective, productive, and cohesive staff with professional/technical expertise and operational talent. The current team is comprised of two longer-term members from pre-merger and a newer team member who fill the roles of Associate Finance Director, Accounts Payable/ Payroll Senior Associate, and Finance Associate.
- Communicate clear performance expectations and provide appropriate feedback when needed, fostering a supportive work relationship and growth-oriented leadership.
- Provide staff support for the Finance and Audit committee: prepare meeting notices, agendas, reports, and other information required by the committee.
- Provide collaborative leadership in maintaining a positive and productive working relationship among the Board of Directors, membership, partner organizations, and volunteers.
- Generate, implement, and monitor departmental short- and long-term strategies in support of departmental strategic and relationship management goals.
- Serve as a liaison to the ELT and advocate for the financial team



PERFORMANCE

OBJECTIVES

GENERAL ADMINISTRATION

- Support and plan for operational technology needs, including coordinating with the Director of Operations to develop & monitor the technology budget
- Ensure complete and timely reporting between United Ways and partner agencies per United Way Worldwide Standard reporting standards.
- Maintain compliance with pre, mid, and post-campaign reporting to ensure timely information for all constituencies on the effectiveness and impact of the annual United Way campaign (Fall timeframe).
- Serve as a partner with the Director of Operations to help maintain and oversee processing operations to ensure proper record-keeping and reporting systems.
- Work collaboratively across departments to support and enhance the donor's experience.
- Support Human Resource function, in particular, payroll, and benefits





THE QUALIFIED

CANDIDATE

The Senior Director of Finance will be responsible for maintaining a system of financial recordkeeping, reporting, and adequate internal controls for the organization. This individual will also monitor cash requirements and investments and prepare and oversee the operating budgets for UWSCMI.

Leading a team of four (4) the Senior Director will provide staff support and carry out the annual and strategic work plans for the Finance and Audit Committees. They will bring an understanding of nonprofit accounting and setting policies and procedures to support the organization's infrastructure.

This Hybrid role will have a "home office location" in one of the four regional offices in Battle Creek, Kalamazoo, Lansing, and Jackson. Executive Leadership Team members are generally in any one of the UWSCMI office locations two days per week and three days offsite in meetings and/or remote. Current team members have home office locations in Kalamazoo and Jackson.

SPECIFIC REQUIREMENTS INCLUDE:

- A minimum of 5 years of progressive experience in leadership and management, with documented ability to serve as an individual contributor as well as manage staff and lead teams.
- A deep commitment to Equity, Diversity, and Inclusion initiatives, and a willingness to continue learning and growth.
- Detail-oriented with the ability to problem solve complex accounting issues, and work with a high degree of accuracy.
- Proven success in the preparation, management, and analysis of operating budgets
- Career track record that shows stability with an organization and capacity to develop and nurture relationships culminating in overall success.
- Excellent written and verbal communication skills through a variety of in-person and virtual settings.
- Knowledge and understanding of nonprofit financials, including the financial aspects of grant management.
- Knowledge of current systems is helpful, but not required. Systems utilized include Acumatica (GL), Teams (Channels, Chats), Monday (Project Management), and Andar (CRM).
- Bachelor's degree in business management/ accounting/finance, or work equivalent experience, is required; Master's degree preferred
- CPA and or CMA is desired.

Don't check off every box in the requirements listed above? Please consider applying anyway! Studies have shown that underrepresented communities - such as women, people of color, LGBTQ, people with disabilities, and immigrants — are less likely to apply for jobs unless they meet every single qualification. United Way of South Central Michigan is dedicated to building an inclusive, diverse, equitable, and accessible workplace that fosters a sense of belonging — so if you are excited about this role but your experience doesn't align perfectly with every qualification in the job description, we encourage you to consider still applying.



HOW TO APPLY

Compensation for this position has recently been benchmarked by United Way of South Central Michigan and KEES and is in a fair market range. This position offers a competitive salary with the range beginning in the low \$100,000 range, along with strong benefits including typical insurance, time off, and a generous retirement plan that provides a 10% employer contribution into the 403(b) retirement plan each year with full vesting after 3 years of service.

UWSCMI is committed to dismantling systemic inequities that continue to cause harm for Black, Indigenous, and other People of Color (BIPOC), Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, and Asexual (LGBTQIA+) people, women, and people with disabilities. We believe that these communities must be centered in the work we do. We strongly encourage applications from people with these identities or who are members of other marginalized communities. Together, we will continue to build capacity and accountability into our policies, practices, and partnerships.

[APPLY HERE](#)

To ensure confidential tracking of all applicants, no applications will be accepted via email. ALL INQUIRIES WILL BE HELD IN STRICT CONFIDENCE.

All candidate-submitted materials and credentials will be reviewed for consistency and accuracy. Candidates can expect that KEES will verify employment/academic/background information both in the screening process and for the finalist(s) in a formal background check. KEES utilizes a 4-step screening process, the first of which is the formal Candidate Application. Applications are reviewed by the KEES team and advanced through various stages of inquiry and confirmation. Applications with specific cover letters will be given priority consideration, on a rolling basis, by September 30, 2024. All applicants will be notified of the outcome of the search. Based on the timing of your specific application, you are welcome to reach out for information on the timeline.

This search is being managed by Project Manager Randi Blasutti and Heather Eddy, President and CEO, of KEES. Questions may be addressed to rblasutti@kees2success.com.

About KEES

KEES (formerly Alford Executive Search) is a nonprofit executive search firm that builds diverse teams and dynamic leaders in the nonprofit and public entity sectors. A woman-owned and operated firm, KEES offers a full array of nonprofit consulting services including executive search, leadership development, interim staffing, and HR support. For more information, please visit www.kees2success.com.