

Heartland United Way

Heartland United Way is a local non-profit organization devoted to improving lives and creating possibilities by investing in the lives and futures of people in need. The United Way collaborates with a network of strong community partners to build brighter futures for youth and families in the areas of education, health, and financial stability. Heartland United Way seeks talented, motivated team members who are passionate about improving our community and who are looking to be part of a dynamic team working to make ambitious changes in the Hall, Hamilton, Howard and Merrick Counties.

JOB OPPORTUNITY: Finance Manager

REPORTS TO: President

STATUS: Part-time hourly employee

OBJECTIVE: Heartland United Way is seeking an experienced bookkeeper/accountant to accurately process donor gifts and manage financial transactions & operations of the organization. This position may be part-time or full-time. The right person must work confidentially, follow standard accounting procedures, and ensure data integrity. Responsibilities will include (but are not limited) donor software management, IRS and government filings, processing financial and donor transactions and compiling monthly and year end reports.

Responsibilities

Finance

Specific Duties:

1. Maintain all financial and official records for the Heartland United Way (such as payroll records, leases, benefits and policies).
2. Maintain control over pledges receivable, cash contributions, credit card payments, recording gifts of stock and accounts payable.
3. Prepare and monitor monthly operating budgets.
4. Prepare monthly cash flow, investment, and financial reports for the Heartland United Way.
5. Prepare (with dual responsibilities) monthly bank reconciliations.
6. Administer the staff payroll and benefit programs for Heartland United Way.
7. Administer all insurance policies
8. Serve as staff for the Finance Committee and Audit Committee.
9. Monitor investment reports to ensure compliance with the investment policy.
10. Ensure deposits of revenues on a daily basis.
11. Prepare all Internal Revenue Service and government filings (including Form 990, Form 5500, Pension Benefit Guaranty forms, Forms 1099, etc.).
12. Prepare monthly financial and year-end information and reports as required for audit purposes and United Way Worldwide.
13. Assume responsibility for the year-end rollover process for all financial information.

Campaign

Specific Duties:

1. Generate campaign reports for initial campaign projections and to track campaign progress.
2. Reconcile monthly SalesForce Donation Reports with QuickBooks.
3. Maintain all designation information and process according to Designation Policy.
4. Prepare receipts for cash contributions of \$250 or more.

5. Prepare tax letters for payment of contributions of \$250 or more.
6. Prepare thank you letters for all \$100+ donors upon receipt of donations.
7. Assist with campaign events
8. Provide team support for all areas of the campaign including professionally representing the United Way at campaign presentations and events.

United Way Technology Support

Specific Duties:

1. Coordinate data collection, updates, protection, utilization and application of information for SalesForce, QuickBooks and Office Products.
2. Update, maintain and backup the computer network and server system as necessary.
3. Install new computer hardware and software to support the work of the United Way Staff and volunteers.
4. Monitor and support the DSL network for building.
5. Ensure Anti-virus protection remains current and effective for all users of DSL.

New Initiatives

Planned Giving Specific Duties:

1. Assist with Planned Giving Initiatives to grow our Endowment Funds
2. Develop materials to be distributed to Financial Planners to encourage bequests to the Heartland United Way
3. Prepare memorial materials to be distributed to local funeral homes for memorial designations.

Disaster Recovery Plan Specific Duties:

1. Develop Disaster Recovery Plan and ensure all facets are implemented and confirmed. (i.e. operations re-established at temporary locations, off-site data access and usage confirmed, program software protected so accessible).

Other

Specific Duties:

To perform all other duties as assigned by the President.

QUALIFIED CANDIDATES: must have experience in accounting; possess strong organizational, analytical and critical thinking skills; be knowledgeable of Excel and QuickBooks. Associate or Bachelors Degree in Accounting is preferred. Equivalent experience may be considered.

SKILLS NEEDED: Use of Microsoft Office Suite [Word/Excel/Access/Publisher], Bookkeeping/Accounting skills [Billing/Deposits/Reconciliations/Financials], Organized, Self Starter/ Quick learner, Multi tasking, Prioritizing (Especially for campaign time), Electronic Data management [entry/clean up/Grouping/Deletion], Install and Uninstall software, Personal and written communication skills and ability to work as a team member.

Heartland United Way is an equal opportunity employer. We evaluate qualified applicants without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, veteran status, age, and other legally protected characteristics. The EEO is the Law poster is available here: <http://www.dol.gov/ofccp/regs/compliance/posters/pdf/eeopost.pdf>. If you need a reasonable accommodation because of a disability for any part of the employment process, please e-mail karen@heartlandunitedway.org or call 308-382-2675 and provide the nature of your request and your contact information.