

# Job Announcement

## Finance Director



**Location:** Carlisle, Pennsylvania  
**Sector:** Nonprofit/Philanthropy  
**Employment Type:** 30-hour week / full benefits  
**Posting Date:** May 15, 2023

### JOB OVERVIEW

The Partnership for Better Health is seeking a Finance Director to direct all day-to-day aspects of the foundation's accounting, investment, financial management and HR benefit administration systems. The director will develop and implement financial policy, accounting and reporting through a comprehensive fiscal plan and budget. Reporting to the Executive Director, the director works closely with the board and staff to ensure high levels of accountability, excellence and transparency in all aspects of financial, fundraising and Human Resource benefit management, in pursuit of the foundation's mission. The director formulates, calculates and provides documentation to continually monitor current financial activities and create forward thinking strategies that ensure the operations of the organization are maintained into the future.

Candidates with diverse backgrounds are encouraged to apply. The Partnership for Better Health offers an attractive compensation and full benefits package, including competitive salary, paid-time-off, employee wellness, medical, dental and life insurances, and retirement benefits. At 30-hours a week, the position contributes to a healthy work/life balance. We are respectful of all people and the ways in which they identify across race, class, ability, gender, sexual orientation, national origin, age and other characteristics. This is a local/on-site director opportunity that offers limited remote work flexibility.

### ORGANIZATIONAL BACKGROUND

The Partnership for Better Health's mission is to champion and invest in ideas, initiatives and collaborations that improve the health of the people and communities in our region. Established in 2001, the foundation has made over \$44 million in grants to organizations throughout South Central Pennsylvania. We bring our mission to life by serving as a catalyst, advocate and collaborator to ensure that everyone has what they need for good health, towards making our communities among the healthiest in the nation. We are a welcoming, inclusive and mission-driven organization.

### ESSENTIAL DUTIES — What You'll Do

- Direct all aspects of the finance and accounting functions within the organization, maintaining internal controls and ensuring compliance with appropriate GAAP standards and regulatory requirements.
- Analyze financial data and present financial reports in an accurate and timely manner to the Partnership's Board and Finance Committee. Clearly communicate quarterly and annual financial statements. Monitor progress and changes, keeping leadership apprised of the Partnership's financial status.
- Serve as chief liaison to the Partnership's Finance and Audit Committees, planning and facilitating committee meetings in concert with the Board's Treasurer and Executive Director. Develop and implement financial policies as adopted by the board.

- Coordinate all audit activities, with external auditors and Audit Sub-Committee.
- Serve as the Partnership's chief liaison to external investment managers, tracking the performance of invested assets in keeping with the Partnership's policies, investment guidelines and funding restrictions.
- Guide the Partnership's annual budgeting and planning process. Develop and review all financial plans to identify, explain and correct variances as appropriate. Analyze and report long-term trends.
- Oversee all financial, project and grants accounting; ensure that expenditures are consistently aligned with grant and program budgets throughout the project/grant period. Prepare accurate financial reporting materials for limited government, corporate and foundation grants.
- Collaborate with the staff team to assess the financial efficacy of program operations. Establishes sound finance and administrative systems to guide program operations.
- Work collaboratively with the Office Operations Manager in carrying out payroll and benefits management, as well as operational, IT and facility needs.
- Direct the benefits enrollment and exit processes for staff. Oversee the competitive bid process for employee benefit plans.
- Lead competitive bid processes for major financial and liability insurance services (e.g., investment management and auditing).
- Coordinate with legal counsel when appropriate on activities involving contractual and/or other legal liabilities and responsibilities.
- Oversee accounting for donor gifts and fundraising campaign summaries.
- Contribute to the annual Match Madness fundraising campaign by assisting with accurate gift data entry as needed, and reconciling daily contributions during month-long campaigns. Ensure smooth alignment between donor tracking and acknowledgement of gifts through fundraising and financial software systems (Fund EZ and DonorPerfect).
- Guide and monitor the creation and investment of organizational and individual endowments and bequests, to benefit the long-term health of our region.
- Maintain streamlined, efficient and effective accounting processes and electronic systems.

### **Other Duties**

- Serve as lead staff for the Finance and Audit Committees and other Board committees, task forces or activities as deemed necessary.
- Serve as a professional representative of the organization at select community events and meetings.
- Pursue annual professional development activities and/or trainings.
- Contribute to and assist with other duties/tasks, as needed.

## **EDUCATION AND EXPERIENCE**

This position is for a seasoned professional with a proven track record in working with nonprofit organizations.

- Bachelor's Degree in Accounting, Finance or equivalent; CPA and/or MBA preferred.
- Seven to ten years of experience in a leadership role with accounting, finance, strategic and operational planning, budgeting and administration.
- At least three to five years of nonprofit accounting and administrative experience with exposure to grant development, auditing and financial reporting.
- Any combination of education and experience equivalent to the essential education and experience listed above.
- Consistent level of involvement in civic interests and professional development activities.

## **Essential Qualifications**

- Proven capacity to prepare nonprofit financial statements, manage administrative details and lead competitive bid processes with vendors.
- Advanced knowledge of accounting and reporting software. Proficient in Microsoft Office (Excel) required and Fund EZ a plus. Fluid and effective in the daily use of new technologies.
- Solid experience coordinating audit activities and directing reporting, budget development and analysis, accounts payable and receivable, general ledger, payroll, and accounting for investments.
- Experience with benefits management.
- Demonstrated experience with grants management and reporting.
- Excellent oral and written communicator. Thoughtful capacity to analyze and communicate key financial concepts and data to individuals at all levels, including finance and non-finance staff, volunteers and community partners.
- Knowledge of accounting for estate planning, including wills, trusts, and estate and gift tax laws, preferred.
- Ability to work collegially and independently in a respectful work environment where colleagues carry significant responsibilities in distinct but overlapping roles.
- Goodwill to periodically assist with unexpected assignments to further the goals of the organization. Confident, inclusive and comfortable team player willing to help with a range of tasks, small and large.
- Flexible working in a setting that strives for continuous improvement, growth and excellence in all aspects of its work. Capacity to multi-task, assess priorities and work efficiently in a fast paced yet calm office environment that supports a positive work/life balance for all team members.
- High levels of diplomacy, confidentiality, professionalism, sound judgement and friendly decorum when interacting with community volunteers, colleagues, business and community partners, and others.
- Experience working with nonprofit boards and committees a plus. Thoughtful interpersonal and volunteer engagement skills.
- Genuine interest in the work and health mission of the foundation.

## **OUR COMMUNITY**

The Partnership for Better Health is located in Carlisle, Pennsylvania. As a college town known for its rich cultural heritage, great restaurants and vibrant business community, Carlisle won the 2021 All-America City award from the National Civic League, and the 2016 national competition to be named *Strongest Town in America*. Carlisle Borough Council has a *Truth & Reconciliation Commission* to address systemic racism and organizations are collaborating to improve racial and health equity (e.g., YWCA, Moving Circles, Hope Station, Victory Circle and Carlisle Responders Network). Located just minutes from the Appalachian Trail, regional parks, lakes and forestlands, our surrounding region has much to offer. Carlisle is 25 minutes from Harrisburg, two hours from Washington, Baltimore and Philadelphia, and three hours from New York City and Pittsburgh. As the fastest growing county in Pennsylvania, Cumberland County enjoys a healthy economic climate.

## **TO APPLY**

Qualified candidates with diverse backgrounds are encouraged to email a cover letter, resume and three references to Casandra Jewell Sweeney (Cjewell@ForBetterHealthPA.org). The position will be open until filled, with interviews beginning in June. You will receive confirmation of receipt of your resume within 3 days of submitting your application. If you do not receive it, please contact Casandra (717-960-9009 x 0).