



## United Way of Laramie County

### Financial Controller

Do you want to contribute to a team winning for our community?

#### Organization

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At United Way of Laramie County, all team members envision a community where all individuals and families have the opportunity to achieve their full potential. This drives our performance and professional motivation. Each employee grows and manages relationships through meaningful engagement to responsibly mobilize and leverage community resources to create long-term changes that produce healthy, educated and financially stable individuals and families in Laramie County. Together, we create resources and leverage strategies for maximum community investment and impact by:

- Igniting our community, and thereby mobilizing people who live and work in Laramie County to action to give, advocate and volunteer;
- Connecting all sectors of society – individuals, businesses, non-profit organizations and governments – to create long term change;
- Raising, investing and leveraging the funds to create and support innovative programs and approaches to generate sustained impact in Laramie County;
- Continually measuring improvement in Laramie County in the areas of education, financial stability, and health;
- Holding ourselves accountable to our community

#### United Way of Laramie County staff are:

- **Mission-Focused:** Create real social change, understanding that improved lives is the end game. This drives performance and professional motivations.
- **Team-Oriented:** Act as a cohesive and open-minded team.
- **Relationship-Oriented:** Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** 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.
- **Brand Steward:** Steward of the brand and understand the role in growing and protecting the reputation and results of the greater network.

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## Position Summary

One of the core propositions of United Way of Laramie County (UWLC) is “Holding ourselves accountable to our community”. The Financial Controller’s (Controller) role is integral in reaching this mission item by directing the financial activities necessary to maintain the fiscal health of UWLC. The Controller is responsible for conducting important phases of UWLC’s accounting work by applying accounting principles and procedures in analyzing financial information, preparing accurate and timely financial reports and statements, and maintaining appropriate accounting control procedures. The Controller exercises discretion and independent judgment in managing UWLC’s business and fiscal financial matters. This position also includes benefit administration and record keeping of employee data.

## Essential Duties and Responsibilities:

### Financial Oversight:

- Provide leadership in UWLC financial strategic overview.
- Ensure financial records are maintained in compliance with Generally Accepted Accounting Principles
- Coordinate Financial policy review and compliance schedule with the Finance Committee
- Effectively communicate and present critical financial matters to the Treasurer and Director.
- Act as Staff liaison to the UWLC Finance Committee.
- Act as Staff liaison for banking and investment relationships
- Supervise cash management and compliance with investment policies.
- Protect operations by keeping financial information confidential.
- Develop yearly budget in conjunction with the Director and Finance Committee
- Coordinate and manage all activities for the annual audit and act as liaison between the auditors and Finance Committee.
- Assist outside CPA firm in preparing annual tax return
- Complete special projects and tasks as deemed appropriate by the Director
- Continuously improve internal control structure and procedures to enhance efficiencies and transparencies
- Coordinate Financial policy review and compliance schedule with the Finance Committee

### Financial Activities:

- Provide the executive committee and board of directors a timely monthly financial statement analysis summary
- Compile, summarize, and analyze financial information to prepare accurate and timely financial statements.

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- Prepare, analyze, and post General Ledger and Subsidiary Account transactions.
- Prepare and post Journal Entries, both recurring and as needed
- Ensure donor miscellaneous designations have been processed accurately and paid to agencies on schedule
- Ensure accurate and appropriate recording of revenues and expenses.
- Reconcile and maintain General Ledger and Subsidiary accounts.
- Reconcile financial discrepancies by collecting and analyzing account information.
- Reconcile bank accounts.
- Manage cash flow and forecasting.
- Obtain and maintain optimal investment instruments such as certificates of deposit and savings accounts
- Develop and maintain financial databases and spreadsheets.
- Maintain the general ledger, including chart of accounts and financial statement formats
- Maintain the Accounting software Sage 50 with updates and backups
- Review and process invoices and requests for payment, monitor vendor accounts to ensure payments are up to date, and resolve invoice discrepancies.
- Prepare, process, and obtain authorization payments by check, wire transfers, or ACH payments.
- Prepare and issue customer invoices.
- Follow established procedures for processing receipts, preparing bank deposits, and processing adjustments.
- Investigate and resolve customer queries.
- Annually update bank account signatory documents with new board member information
- Manage Record Retention of financial and payroll records, and employee files.
- Coordinate the completion of United Way Worldwide survey, Database II.

**Employee Benefits, Orientation and Records:**

- Perform all Payroll functions, to include federal and state regulatory reporting
- Administer employee benefit programs, and manage and maintain records of employee benefit balances, including but not limited to: 403(b) Retirement savings, Flexible Spending Accounts and third-party disability and life insurance.
- Coordinate orientation and on-boarding of new employees
- Maintain and reconcile yearly SERP payment and report

**Risk Management:**

- Assure Business and Property insurance and Director and Officers insurance is adequate and paid timely

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**Computer Network, Users and Software:**

- Maintain and purchase as necessary computer equipment and accessories for the network and staff
- Maintain a capital expenditures schedule along with depreciation entries
- Administer the users for Donation Tracker software

**Business Contracts and Documentation**

- Maintain permanent files for tax exemptions, state filings, rental contracts, equipment contracts, City and County contracts, and other important business files as necessary

**Other tasks as deemed defined by the Director or by contract:**

- Act as a fiscal agent for program partners or third-party agencies as requested
- Maintain subsidiary accounting for United Way initiatives – such as Community Schools

**Organization Relationships:**

This position reports to the Executive Director (Director).

As a team member performs other miscellaneous duties that may be of assistance to staff and volunteers, including but not limited to, the following:

- a. Assists with Special Events.
- b. Performs minor housekeeping duties.
- c. Contributes to the donor relationship cycle of Identify, Cultivate, Ask and Steward

This employee demonstrates a commitment to continuous professional growth and quality personal performance while also demonstrating the ability to function effectively as a member of a team of staff and volunteers. This employee has demonstrated written, telephone and face-to-face interpersonal communication skills for interacting with various stakeholders including volunteers, donors, the general public and United Way staff and Board members. This position requires a personable, discrete individual capable of exercising independent judgment in the execution of his/her assigned responsibilities. Possible exposure to client information requires a commitment to maintaining confidentiality.

Employees are expected to assist, supplement and support each other while maintaining the primary job responsibilities outlined in this job description.

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### **External Relationships:**

The Controller has extensive contact with various public entities. The Controller should strive to make a positive, professional impression in personal conduct and appearance, both outside the office and within it. The Controller must understand and consistently communicate the mission, goals and activities of UWLC.

### **Qualifications:**

The following requirements are representative of the knowledge, skills and abilities required to satisfactorily perform the essential duties of this position.

#### **Education and Experience:**

- Bachelor's Degree in accounting, or equivalent based on other degrees in related fields and/or experience.
- Minimum 5 years general accounting experience
- Knowledge of Accrual and Fund Accounting.
- Knowledge of Accounts Payable, Accounts Receivable.
- Knowledge of Payroll Accounting.
- Knowledge of Generally Accepted Accounting Practices and Principles.

#### **Skills and Abilities:**

- Strong leadership communication and interpersonal abilities.
- Operate with a high level of autonomy
- Organize, prioritize and meet deadlines
- Ability to work some evenings and weekends
- Solid analytical skills.
- Ability to plan, coordinate and direct others.
- Creative problem solver, critical thinker, shows sound judgment and strong volunteer/professional leadership.
- Strong, professional written and oral communication skills.
- Able to work in a changing environment.
- System experience with accounting software, Sage50 accounting software preferred.
- Be proficient using Microsoft Office applications.
- Ability to interact with all levels of staff.
- Excellent project management skills.

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**Material and Equipment Directly Used:**

Desktop computer, keyboard, computer printer, copy and fax machine, scanner, telephone, ten-key calculator, network menu, Microsoft Office software, accounting software, and special software specific to United Way.

**Physical Demands:**

An open office environment with comfortable surroundings. While performing the duties of this job, employees are regularly required to sit; talk or hear, both in person and by telephone; use hands to finger, handle, feel or operate standard office equipment, and reach with hands and arms. Employees are frequently required to stand and walk and lift up to ten pounds. Specific vision abilities required by this job include close vision and the ability to adjust focus. Must have a valid driver's license and ability to travel.

**Parameters:**

32 hours a week, paid Holidays, Vacation and Sick leave.  
403 (B) matching retirement.

The position is open until filled however application materials received by **November 22, 2017** will receive priority consideration.

To apply, email Connie Sloan Cathcart at [director@unitedwayoflaramiecounty.org](mailto:director@unitedwayoflaramiecounty.org)

Resume and Cover Letter required.

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