

**Title:** Finance Director  
**Reports To:** Executive Director  
**EEO Category:** Executive  
**FLSA Status:** Exempt  
**Pay Grade:**  
**Job Description Update:** August 2016  
**Approved By:** Human Resources

---

**Position Summary:**

The Finance Director is responsible for the overall financial management of Opportunities for WBC and the stewardship of temporal goods and fiscal resources in support of the mission and goals. This position oversees all financial and related functions including budgeting, accounting, investments, risk management and liability, and procurement. The Finance Director reports to the Executive Director and operates under general supervision with wide latitude for the use of independent judgment and initiative.

**Essential Job Duties:**

- Analyze and make recommendations pertaining to all major financial decisions and questions facing Opportunities for WBC.
- Serve as staff liaison and work in collaboration with the OWBC Finance Committee and other consultative bodies as established by the Executive Director.
- Oversee the preparation and monitoring of the annual budget. Make recommendations as to available resources and financial limitations.
- Secure the services and coordinate the relationship with various parties, such as bankers, insurance brokers, investment advisors, rating agencies, actuaries and legal counsel.
- Reviews and approves financial commitments of OWBC including commitments to acquire or dispose of property and the construction of new buildings.
- Approve and authorize all loans and draw requests on the OWBC line of credit with all lending institutions.
- Implement and evaluate financial policies and practices of OWBC to insure that financial goals and objectives are met in accordance with grant guidelines, OWBC policies and government regulations.
- Hire and supervise accounting/finance staff in accordance with personnel policies and procedures including orientation and training, career development advice, establishing employee goals, conducting performance reviews, coaching, counseling and disciplining staff, and recommending terminations.
- Respond to requests for information from Executive Director, Senior Leadership staff, Finance Committee, Facilities Committee and other parties as needed.
- Assist in reviewing all contracts, trusts, deeds, affidavits, and other legal documents submitted to the Executive Director as they relate to financial matters.
- Coordinates with other departments concerning short and long-range fiscal needs and plans.
- Maintain a OWBC presence on various committees and boards.
- Act as a resource for annual audits.
- Perform other tasks as directed by the Executive Director.

**Knowledge, Skills and Abilities:**

- Knowledge in accounting/financial matters, general business management and personnel management, especially with regard to not-for-profit institutions.
- Skill in public speaking.
- Skill in strategic planning.
- Knowledge of non-profit business practices, rules and regulations.
- Ability to operate various word-processing software, spreadsheets, and database programs.
- Ability to work effectively with others.
- Ability to provide excellent customer service to internal and external customers.
- Ability to organize, prioritize and utilize effective time management techniques.
- Ability to respect confidentiality at all times.
- Ability to carry out multiple tasks and meet deadlines.
- Ability to follow instructions furnished in verbal or written format.

**Minimum Qualifications:**

*Education and Trainings:*

- Bachelor's degree from an accredited university in accounting or finance.

*Experience:*

- Five to ten years of administrative leadership in a not-for-profit organization, to include working with consultative bodies, supervision, accounting, investing, borrowing, and business law. In addition, experience and knowledge is required in the following areas: properties, risk management, insurance, and computer systems.
- Advanced knowledge of budgeting principles and practices (including use of spreadsheet software), accounting principles, investment, and financial reporting methodologies.
- Experience in long range strategic planning (project planning and management, budgeting and cash flow).
- Experience negotiating complex financial arrangements with lenders and working knowledge of and ability to calculate various complex financial ratios and analysis.

*Licenses/Certifications:*

- Valid Texas driver's license.
- Certified Public Accountant

**Mental / Physical Tasks (F= Frequent, O=Occasional, R=Rarely):**

F	Talking	F	Using personal computer
F	Listening	F	Sitting
O	Standing	O	Bending
O	Walking		Other (list)
O	Grasping/holding		
O	Lifting/carrying		
R	Moving heavy equipment		
O	Driving		
F	Using office equipment, stapler, telephone, etc.		

**Working Conditions:**

- Working in a fast paced environment with priorities and plans that may change rapidly.
- Working on weekends, evenings and some holiday may be required.



**Employee Certification at NEO**

By my signature below, I verify that a copy of this document has been provided to me and I have had an opportunity to review it and discuss its contents. I understand this document does not create or imply any employment contract or agreement, and is meant only to be a guide to me in my regular duties. I understand that tasks or assignments may be added or removed from the job description by my supervisor at any time, without notice.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date