

Position: CONTROLLER
Hiring Organization: United Way of Salt Lake
Department: FINANCE
Reports to: CHIEF FINANCIAL OFFICER
Date Prepared: July 28, 2016

THE ORGANIZATION

United Way of Salt Lake (UWSL) has made a promise to our community—to change the odds so all children and their families have the same chance to succeed in school and life. We have adopted a unique approach to community problem-solving called collective impact which allows us to directly engage with communities. Our workplace is fast-paced, friendly, and adaptive. At UWSL we believe in celebrating success, learning from failure, and ambitious goals. Our wages are competitive; the benefits package is comprehensive; perks like flexible schedules and staff parties make every day unique.

POSITION OVERVIEW

The Controller collects and prepares financial data in order to prepare and provide reports that incorporate data analysis, budget forecasting, planning, cost analysis and tracking. The Controller works closely with and under the direction of the CFO.

KEY RESPONSIBILITIES

1. Assist in the preparation of budgets and ongoing long-term financial forecasts
2. Prepare financial reports for various internal and external stakeholders
3. Compile and analyze financial data using advanced spreadsheet (Excel) skills including pivot tables, etc.
4. Develop and analyze cost allocation standards and practices including FTE (full-time-equivalent) formulas and other techniques to be used in cost allocation among administrative, fund raising, and program costs
5. Assist in defining and developing financial performance indicators, analyzing and interpreting financial data and tracking financial performance objectives to improve the accuracy and effectiveness of the accounting and financial reporting system
6. Set up and maintain projects, grants, and allocation distributions in the Blackbaud Financial Edge non-profit accounting software
7. Prepare data to be used in accounting journal entries related to cost allocation among departments
8. Prepare journal entries for month end closing process
9. Reconcile balance sheet accounts including all asset, liability, and equity accounts
10. Prepare schedules needed for annual external audit and tax schedules for Form 990
11. Liaison with all departments to ensure effective communication and accurate recording of programmatic financial activities in the accounting system
12. Prepare reports for grantors/restricted contributors in compliance with contractual and agreed upon use of resources, including government grants
13. Work closely with the CI department including attending relevant meetings and assisting in relevant projects, including:
 - a. *Partner budgets.*
 - i. Create budgets for UWSL's annual and Continuous Improvement investments
 - ii. Provide technical assistance to Collective Impact staff and partners on completion of budget forms (expense projections and end-year actuals)
 - iii. Ensure that budgets exist in standard format and include relevant expenses.
 - iv. Complete and process payment authorization forms in a timely manner
 - v. Maintain reports that show investments by partner and location, strategy area, and outcome area
 - b. *Technology support.*
 - i. Evaluate technology applications to improve financial and operational effectiveness

- ii. Create Adobe, Excel and Smartsheet forms for the purpose of capturing various types of financial and outcome information from partners
 - c. *Discretionary budgets.*
 - i. Support Community School discretionary budget process, creating tracking devices and reporting out regularly on types and amounts of expenditures
 - d. *Grant/resource development support.* Maintain financial information that helps UWSL senior managers to determine where funding needs exist
14. Seek innovative ways to continuously improve processes related to financial and operational areas
15. Other duties as assigned

POSITION REQUIREMENTS

- Proven proficiency with spreadsheets, PC-based software, and automated relational database management systems required (Excel, Access, and PowerPoint)
- Knowledge of statistics and demonstrated analytical, problem solving skills
- Ability to manage multiple projects from start to finish
- Ability to work well with others in fast paced, dynamic environment, thinking strategically and effectively when faced with difficult challenges
- Ability to clearly communicate results and provide recommendations to diverse stakeholders
- Interest and demonstrated practice in process improvement and innovation
- Demonstrated experience using financial data for decision making
- A solutions-oriented mindset, with the capacity to observe, interpret, apply lessons learned to situations, and be a flexible thinker

MINIMUM REQUIREMENTS

- Bachelor's degree in accounting or finance
- 2-3 years in finance or accounting role performing analysis
- 2-3 years data analysis experience
- Advanced Excel/spreadsheet proficiency

PHYSICAL REQUIREMENTS

The employee is regularly required to communicate clearly, and exchange accurate information interpersonally or through communication devices. Must be able to learn new systems and procedures prepare and analyze data and figures; constantly operate a computer and other standard office machinery. The position requires occasional movement throughout the office to access files, papers, or move supplies weighing up to 15lbs. Must be able to remain in a stationary position 75% of the time.

SALARY INFORMATION & FLSA STATUS

This is an exempt position; salary commensurate with experience.

TO APPLY

Interested applicants should submit a cover letter, resume, and employment application to jobs@uw.org. Only complete applications will be considered for the position. Employment applications and the complete job description can be found at <http://www.uw.org/about-us/careers.html>.

NOTE: *The statements in this position description are intended to describe the general nature and level of work being performed but are not to be seen as a complete list of responsibilities, duties, and skills required of the person employed. Also, the statements do not establish a contract for employment and are subject to change at the discretion of the employer.*