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FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

## YMCA OF GREATER MONTGOMERY JOB DESCRIPTION

Job Title: **Sr. Vice President & Chief Financial Officer**

Job Code: 10

FLSA Status: Exempt

Job Grade: 01

Reports to: President & CEO

Revision Date: 09/10/24

Leadership Level: Organizational Leader

Primary Function/Department: Association Office

### POSITION SUMMARY:

This position supports the work of the Y, a leading nonprofit, charitable organization committed to strengthening community through youth development, healthy living and social responsibility. The Sr. Vice President & Chief Financial Officer at YMCA of Greater Montgomery serves on the CEO's senior leadership team; oversees and leads financial matters, investment accounts and information systems; and provides strategic direction and leadership for YMCA business operations and initiatives, including support of the Audit/Finance Committee of the Metro Board and Endowment Foundation. The Chief Financial Officer also positions the Y as a community convener and collaborator to address critical social issues and represents the CEO as needed. In addition, every position in the YMCA of Greater Montgomery is responsible for modeling behaviors that exemplify the four pillars of character - caring, honesty, respect and responsibility.

### OUR CULTURE:

Our mission and core values are brought to life by our culture. In the Y, we strive to live our cause of strengthening communities with purpose and intentionality every day. **We are welcoming:** we are open to all. We are a place where you can belong and become. **We are genuine:** we value you and embrace your individuality. **We are hopeful:** we believe in you and your potential to become a catalyst in the world. **We are nurturing:** we support you in your journey to develop your full potential. **We are determined:** above all else, we are on a relentless quest to make our community stronger beginning with you.

### ESSENTIAL FUNCTIONS:

1. Monitors monthly financial operations, prepares analysis and reports, and gives guidance to executive and operating staff. Works closely with operations staff on issues that affect financial outcome. Secures and allocates program or project resources so that strategic objectives can be achieved. Prepares specific recommendations.
2. Reviews, updates, and/or develops internal control systems for the YMCA and oversees internal audits which check for compliance on a variety of policies and standards. Provides recommendations for improvement.
3. Manages the staff and oversees the operations of the accounting/finance, information systems and other assigned departments.
4. Oversees and certifies the annual audit and meets periodically with the outside auditors to maintain communications and keep them informed of changes in the YMCA. Ensures that current accounting standards and legal requirements are met.
5. Actively engages the board in challenging conversations and decision making to advance the Y's impact. Works directly with assigned committee(s) of the board (Finance, Insurance, Audit) and Endowment



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Foundation on investments to build volunteer relationships, develop policies, monitor their implementation and meet the related needs of the board.

6. Anticipates trends and their implications on the future of the organization. Manages investments, under the direction of the Metro Board, and within the risk tolerance expressed by the Board via the asset allocation policy.
7. Develops performance indicators and measurement systems for tracking strategic plan objectives. Evaluates current business models and leads efforts to modify or redesign business models where necessary.
8. Works with association leadership to strategize on how association resources are invested for best utilization and growth potential.
9. Oversees preparation of reports to all local agencies, YMCA of the USA and governmental agencies. Oversees preparation of tax returns including IRS Form 990.
10. Oversees the development of the annual operating budget, including all branch budgets. Guides the organization to make tough choices about what to stop, start, and continue. Works closely with operations staff to ensure that branch budgets are well-planned, realistic, and prepared in a timely manner.
11. Manages tax-exempt bond transactions and files all necessary reports. Establishes, maintains and/or monitors all banking and financing relationships.
12. Oversees Insurance Procurement and claim processing essential of the role of Risk Management.
13. Maintains all necessary records and accounting reports and records all transactions on a timely basis.
14. Maintains good working relationships with auditors, bankers, investment counselors, attorneys and other professional advisors.
15. Represents the YMCA with key stakeholders, community organizations and events as needed.

#### **LEADERSHIP COMPETENCIES:**

- Critical Thinking & Decision Making
- Fiscal Management
- Program/Project Management
- Volunteerism

#### **QUALIFICATIONS:**

- Bachelor's degree in business, finance or equivalent; MBA, CPA or CMA preferred.
- YMCA Organizational Leader certification preferred.
- Eight or more years of substantive experience in accounting and fiscal management.
- Knowledge and understanding of general business matters required including budget development, financial reporting, cash management, business taxes, banking and debt financing instruments.
- Knowledge of computer systems, including experience with system selection, new system implementation and project management.
- Personal computer skills required.
- Experience with investment management and asset allocation preferred.
- Experience in effectively managing a staff team.
- Previous experience with voluntary/nonprofit organizations preferred.

#### **WORK ENVIRONMENT & PHYSICAL DEMANDS:**

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.



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- While performing the duties of this job, the employee is regularly required to use a computer for extended periods of time and be able to communicate using a computer and phone/smart device.
- The employee frequently is required to sit and reach, and must be able to move around the work environment.
- The employee must occasionally lift and/or move up to 10 pounds.
- Specific vision abilities required by this job include close vision, distance vision, and the ability to adjust.
- The noise level in the work environment is usually moderate.

**SIGNATURE:**

I have reviewed and understand this job description.

\_\_\_\_\_  
Employee's name

\_\_\_\_\_  
Employee's signature

Today's date: \_\_\_\_\_