



United Way
of South Hampton Roads

We bring people and resources together to solve problems too big for any of us to solve alone.

UNITED WAY OF SOUTH HAMPTON ROADS

Title:	Nonprofit Controller
Department:	Finance
Report To:	Chief Operating Officer
Supervises:	Senior Accountant; Accounts Receivable Specialist
Date Created:	June 2021; revised January 2023

Why Work for United Way

Do you want to leave work every day knowing that you made an impact? At United Way of South Hampton Roads (UWSHR), you'll work in a fun and supportive environment where every day is a new opportunity to make a difference. If you talk to our employees, the single trait we all have in common is passion. We work hard because we love what we do and we know how much our community needs us. You'll learn from some of the best in the business and be constantly challenged in an ever-changing industry. Plus, we offer excellent benefits and opportunities for advancement. If you want to be great while doing good, join the United Way team.

Objectives & Expectations

United Way improves lives by mobilizing the caring power of communities to advance the common good and to help all residents thrive. We all benefit when a child succeeds in school, when someone finds a job that sustains a family, or when more people get quality, affordable healthcare. United Way endeavors to drive measurable impact by focusing and accelerating our current agenda centered around economic mobility, education, and health initiatives while remaining responsive to community needs with flexibility to respond to critical needs and crises.

The controller is responsible for the organization's accounting practices and compliance functions and will play an active role in developing budgets for programmatic funding year-round. Efficiency, accuracy, and timeliness are all necessary skills to be successful. Communication skills are also a must, as well as having an ability to present to various committees. Successful candidates will have a strong desire to learn and master the operations of United Way and a willingness to continue developing professionally with defined goals annually. Lastly, the controller is expected to deliver excellent customer service both externally and internally.

Commitment to Diversity, Equity & Inclusion

We take the broadest possible view of diversity.

We value the visible and invisible qualities that make you who you are.

We welcome that every person brings a unique perspective and experience to advance our mission and progress our fight for the health, education, and financial stability of every person in every community.

We believe that each United Way community member, donor, volunteer, advocate, and employee must have equal access to solving community problems.

We strive to include diversity, equity, and inclusion practices at the center of our daily work.

We commit to using these practices for our business and our communities.

Cultural Competence: The Controller adapts a lens of cultural competency that conveys empathy, support, and an understanding of the people they work with both internally and externally, engage with, and the people they serve. This competency helps to build trust and effective engagement, build stronger relationships, expand our organization's reach, and more effectively and respectfully engage with people regardless of background.



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Core Competencies are characteristics that all employees are expected to exhibit as a member of the UWSHR team. These include:

- **Mission Focused:** The top priority is creating real social change that leads to better lives and healthier communities.
- **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:** Understands his/her role in growing and protecting the reputation and results of the organization, and thus, the greater network.

Essential Duties and Responsibilities

1. Oversight of senior accountant functions including but not limited to:
 - Payroll administration
 - Cash disbursements (to include, but not limited to grants, operations, payroll, designations)
 - Bank account management (transfers, EFTs)
 - Internal controls (additional monitoring of compliance)
 - Proportionate share of fundraising cost letters
 - Compliance items
2. Oversight of Accounts Receivable Specialist functions including but not limited to:
 - Proper weekly coding of payments to receivable and revenue accounts
 - Credit card processing
 - Correct application of payroll deduction payments into CRM
 - CRM payment reconciliation to general ledger and ongoing monitoring
3. Month/quarter/annual closing:
 - Prepare, review, and post all bank and investment account reconciliations
 - Initially, reconcile cash receipts from CRM system back to general ledger accounts (stocks, payroll deductions, credit cards, ACHs, checks, and cash) and eventually transfer responsibility to AR Specialist
 - Review and approve all cash disbursements for support and proper coding (payroll, credit cards, allocations, grants, and operating expenses)
 - Review and approve pledge invoicing and tax receipts for distribution
 - Guide accounting and pledge processing team
4. Prepare, review, and distribute monthly board package
 - Balance sheet (statement of financial position)
 - Income statement (statement of activities)
 - Cash flow projections and analysis
 - Budget to actual analysis
 - KPIs (Key Performance Indicators)
5. Budget and forecasting
 - Prepare and present pro formas prior to budget
 - Prepare and present comprehensive annual budget



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6. Audit and taxes
 - Oversee preparation for, and execution of, audit and 990
 - Maintain relationship with 3rd party assurance provider
7. Grant management
 - Compliance with DOT, Assistance Living 21.027
 - Quarterly reporting
 - Budget and financial reporting for single audit requirements
8. Compliance oversight
 - Approve VDAC filings
 - Approve SCC filings
 - Review and approve year-end payroll tax filings
 - Review and approve distribution of Patriot Act communications
 - Prepare agency proportionate shares of fundraising costs
 - Standard M (*Communications w/ other United Ways on fundraising & processing fee deductions*)
9. Administrative duties:
 - Internal controls and standard operating procedures
 - Liaison for board, finance, and investment committees
 - CRM deposit management and GL extract
 - Review and approve disbursements, transfers, payouts, and reconciliations
 - Reconcile quarterly investment activity and partner statements
10. Other duties as assigned

Key Skills Requirements

- Bachelor's degree in accounting; fund accounting experience preferred
- CPA and/or CMA license preferred; CPA/CMA candidates also encouraged to apply
- Minimum of 5 years' experience in accounting with at least 2 years in nonprofit accounting preferred
- Minimum of 2 years of supervisory experience
- Demonstrated history of success working within a team environment as well as volunteer engagement experience
- Proficient with Microsoft Excel, Word, and accounting software
- Experience using cloud-based storage and cloud-based collaboration platforms (i.e., SharePoint)

Work Demands & Environment:

- Ability to stoop, lift, finger – for example pick, pinch, or type and grasp
- Ability to clearly and concisely express and exchange detailed information and ideas to others accurately via spoken word
- Exert up to 20 pounds of force occasionally and/or a negligible amount of force frequently to lift, carry, push, pull or otherwise move objects
- Ability to inspect and analyze figures, accounting items, written materials, newsprint, computer terminal characters, transcription, and other similar objects at distances generally close to the eyes.
- The worker is subject to a variety of inside environmental conditions that may occur in an office, a private home, or elsewhere in the community including temperature variations, unpleasant odors, and potential allergens



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- Although inside work is the standard, it is required that the individual be able to travel and may be exposed to a variety of weather conditions

Interested? Please send your resume to humanresources@unitedwayshr.org. We will continue accepting applications until the position is filled.

United Way of South Hampton Roads is an Equal Opportunity Employer. In order to provide equal employment and advancement opportunities to all individuals, employment decisions at UWSHR will be based on merit, qualifications, and abilities. UWSHR does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, national origin, age, disability, sexual orientation, gender identity, veteran status or genetics. Please Note: Requirements, skills, and abilities described above are representative of those that must be met by an employee to successfully perform the essential functions of this position with or without reasonable accommodation. In no instance, however, should the duties, responsibilities, and requirements be interpreted as all-inclusive.