

Liberty Hospital Foundation

DIRECTOR OF FINANCE & OPERATIONS

Last Modified: 9/6/2022

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| **JOB DESCRIPTION** |

* Position Title:
  + Director of Finance & Operations
* FLSA Classification:
  + Exempt
* Reporting Relationship:
  + Executive Director, Foundation – Dotted line reporting to Board Treasurer
* Physical Demands Category:

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| **Summary** |

* The Director of Finance & Operations plays a critical role in managing the day-to-day effectiveness and efficiency of the Liberty Hospital Foundation (LHF). The position is responsible for the overall financial management and planning, accounting, banking functions and finance activities, including budgeting, audits, and reporting; and management operations. In this role, the position will work closely with the Executive Director to generate and track budgets both for internal purposes and outside funders. In addition, this position will oversee implementation of the capital campaign expenditures and implementation of the overall plan for capital campaigns.

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| **Required Qualifications** |

* Education/Training:
  + Bachelor’s degree in finance or related field and 3-5 years relevant work experience.
* Experience:
  + Demonstrated flexibility, adaptability, and ability to thrive in a small, collaborative environment.  Proficient in Microsoft Office Suite programs.  Comfort with cloud technology and willingness to learn.  Strong verbal and written communication.  Relationship development and management skills.  Outstanding organization and detail orientation.
* Licensure/Certification/Registration:
  + None

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| **Preferred Qualifications** |

* Education/Training:
  + Bachelor’s degree in finance or related field and 7-10+ years relevant work experience.
* Experience:
  + Experience with CRM (Customer Relationship Management) and project management software.  Expert experience with Excel. Capital campaign experience.
* Licensure/Certification/Registration:
  + CPA

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| **Essential Functions** |

* **Finance Operations:**
  + Lead the preparation of annual budgets, identify budget priorities, provide training and guidance to budget owners, facilitate meetings, provide necessary documentation to the board and budget owners, and ensure all documentation is accurate
  + Serve as primary financial liaison to the Board work closely with our Board Treasurer; participate in Board meetings and finance committee meetings; prepare reports and make presentations on a variety of matters to the Board and others
  + Manage the overall accounting and bookkeeping processes for the organization, tracking accounts payable and receivable, inventory and capital assets, banking, and payroll functions, and look for opportunities to improve quality, create efficiencies and accuracy
  + Reconcile bank and credit card statements and generate monthly, quarterly, and yearly financial reports
  + Ensure the timely and accurate preparation of the financial records and reports of the organization in accordance with generally accepted accounting principles
  + Work closely with the Executive Director and other staff and consultants on fundraising and development efforts to handle revenue for all initiatives, including but not limited to: creating and monitoring all grant budgets and grant-related financial information; processing and tracking all forms of donations; tracking use of restricted funds; produce revenue reports.
  + Prepare budgets and financial reports for funders and other outside parties, as requested
  + Provide analysis of financial statements, including statement of activities, fund balance, and sources/uses of funds, to the Executive Director and, as requested, to the Board of Directors
  + Provide oversight of facility vendors and contracts, and establishing and managing vendor accounts and relationships
  + Supervise the financial health of the organization alongside the Executive Director
  + Manage the compensation and benefits provided to employees
* **Office Management:**
  + Serve as the first point of contact at Liberty Hospital Foundation, via managing main phone and e-mail accounts.
  + Manage ordering and tracking of office supplies, postage, and mailing.
  + Maintain, administer, and train others on the effective use of platforms and systems, including CRM, accounting and financial tracking software, MS Project.
  + Maintain files following LHF procedures and compliance with state and federal requirements.
* **Fundraising Support:**
  + Create and manage records in CRM including constituent and gift information.
  + Work with fundraising staff to develop online giving and registration forms.
  + Pull or schedule reports for fundraising staff as needed.
  + Assist with logistics and coordination of fundraising events and activities.
* **Hospital & Community Impact:**
  + Manage grant applicant and scholarship candidate/recipient communications, including inquiries, interviews, applications, and reporting requirements.
  + Manage contact with program liaisons within Hospital, collect regular reporting data on programming activities.  Order program-related supplies and resources as needed.
  + Manage grant, scholarship, and program evaluation records, and coordinate use of data analysis to staff and Board committees for learning and improvement.
  + Coordinate and provide support for committee meetings.

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| **Disclaimer** |

* The above information on this description has been designed to indicate the general nature and level of work performed by employees within the position. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this position. Each employee will be sensitive to population specific needs in the execution of their role.

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| **PERFORMANCE REVIEW** |

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| **DEFINITION OF RATINGS** |

* **EXCEPTIONAL:** Employee exceeds expectations by stepping well beyond the scope of their position description to deliver change to the department, unit, or organization. The individual is an exceptional employee who achieves an unusually high level of performance relative to all assignments and objectives. The exception is that this rating should reflect performance in the top 5% of all performers.
* **ADVANCED:** The employee is a critical member of the team with performance that is consistently above established expectations. The employee seeks improvement of self, office practices, team, and/or department. The individual goes above and beyond what is expected to contribute to the success of the department or unit.
* **SOLID:** The employee fully meets the established job expectations and is a reliable and solid performer. The employee generally performs well and requires little guidance. The individual demonstrates initiative to meet the goals and objectives of the position.
* **DEVELOPING:** The employee meets some of the job expectations, but not all. The individual requires support and direction to complete assignments. The employee generally performs at a minimum level of effort and improvement is needed to fully meet expectations. This rating may be given to a new (or new to the position) employee who has yet to learn or master a specific skill. In this latter case, the rating reflects the employee's time in the position.
* **UNSATISFACTORY:** The employee's performance generally fails to meet the established expectations or requires frequent supervision and/or the redoing of work. The individual is not performing at the level expected. Unacceptable job performance is due to the employee's lack of knowledge, skill or effort.

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| **JOB-SPECIFIC PERFORMANCE** |

* **Essential Functions:** Demonstrates the essential functions of their position.
* **Job Skills and Knowledge:** Possess the required skills, knowledge, and abilities to competently perform the job; is knowledgeable of best practices in their field

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| **COMPETENCIES** |

* **Work Quality:** Demonstrates a commitment to quality by taking pride in one's work, striving for excellence and delivering the best possible results. Completes work assignments thoroughly and in an accurate, prompt, and organized manner. Identifies and corrects errors. Pays attention to detail. Looks for opportunities to improved outcomes and generates ideas for building process efficiencies. Utilizes feedback to improve work and builds on previous learnings. Welcomes constructive feedback and monitors own work to ensure quality.
* **Initiative:** Contributes fresh ideas to provide solutions to the work in one's role or beyond, where relevant. Identifies ways to stay current in one's role and to meet organizational needs. Uses sound judgment to develop new insights into situations and applies different and novel solutions to make improvements. Utilizes analytical and conceptual abilities to formulate a practical plan with positive impact. This competency is focused on turning ideas into action. Thinks beyond the immediate imperative to the future. Challenges norms with innovative thinking and approaches.
* **Communication:** Demonstrates clear, timely, and consistent speaking, listening and written communications. Listens and seeks clarification and responds clearly to questions. Listens actively and communicates to others to build trusting relationships. Written communication is clear, grammatically correct, effective and relative to the needs and scope for one's role. Relates effectively to all levels of the organization. Fosters connections and a collaborative approach.
* **Dependability:** Reports to work regularly, on time and is accountable during the workday. Cooperates and interacts with employees inside and outside of the work unit contributing to improved operations. Aligns individual efforts with organizational and unit goals. Takes ownership of work and is accountable for outcomes. Is aware of and follows policies and procedures. Establishes trust and respect by following through on commitments. Completes tasks and assignments with minimal supervision. Committed to meeting deadlines.
* **Inclusiveness:** Actively creates and supports an inclusive and equitable workplace by embedding diversity into all aspects of the workplace. This may include policies, procedures, training, mission, values, goals, unit climate and culture, interactions with colleagues, co-workers, patients and visitors, leadership practices, programming, hiring, marketing, evaluation, promotion, and other workplace dimensions.

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| **COMPLIANCE WITH REQUIREMENTS** |

* Employee has complied with the following requirements while also meeting deadline(s):
  + **Required Licensure**
  + **Required Certification(s)**  
    (if "Yes" enter the certification name and expiration date in the comment box provided)
  + **Annual Education**
  + **Employee Health Requirements**
  + **Annual Competency Review**

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| **PAY RANGE & BENEFITS** |

The pay range for this position is $70,000 to $80,000 annually, paid bi-weekly.

* At Liberty Hospital Foundation, your benefits start the first of the month following your first day of employment, and we pay the majority if not all the cost of your essential benefits. Whether you are looking for health, vision and dental insurance or a flexible healthcare spending account, we have you covered. Additional benefits can include a retirement plan, educational assistance, extended illness and short/long-term disability coverage, life insurance, paid days off, employee assistance program, as well as FMLA, personal and military leave options.
* View the benefits package here: <https://www.libertyhospital.org/careers/benefits/>

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| **TO APPLY** |

Send the following to [Foundation@LibertyHospital.org](mailto:Foundation@LibertyHospital.org):

Cover Letter  
Resume  
Example Campaign or Marketing Materials Produced