



Maui United Way

Maui United Way

PO Box 275

Kahului, HI 96733

Phone: 808-244-8787

Title: Chief Financial Officer

Reports to: President & CEO of Maui United Way, Kahului, Maui

Applications due: October 28, 2024

Position Summary:

The Chief Financial Officer is an analytical and mission-driven leader who serves as an integral member of the senior management team. The CFO enforces the strategic goals with an annual budget of \$3-8 million. The CFO develops financial models that reshape and accelerate revenue results and ensure strong financial practices. The CFO creates and manages a team that delivers Maui United Way's financial management processes including financial planning, budgeting, analysis, employee benefits, compensation, new revenue channels and policy matters. The CFO partners with the CEO and chair of the Finance committee to improve financial results.

Financial and Administrative Management:

- As a member of Maui United Way's management team, this position directs the development and administration of Maui United Way (MUW) financial matters, including budgeting, auditing, accounting and financial reporting.
- Direct responsibility for:
 - Develop and oversee the annual budget.
 - Negotiate, maintain, and ensure compliance with contracts and agreements regarding outsourced facilities maintenance and work to maximize performance.
 - Oversee the payroll function and ensure compliance with all 403b plan documents and federal and state regulations.
 - Review, analyze, and report on monthly results; update strategic financial plans and forecasts; provide monthly financial reporting to internal and external stakeholders; oversee grant administration; and manage key contracts.
 - Review financial legal matters and contracts.
 - Conduct program reviews and analyses and assist leadership in managing MUW's portfolio of programs to best balance between budgeted results and mission effectiveness.
 - Monitor the performance and application of investment funds.
 - Oversee contractors including review of monthly reconciliations, journal entries, cash receipts, designation reporting and payments. Maintain the integrity integrity of the financial records recorded in the financial software system.



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- Monitor and report on Fiscal Sponsorship and Grant expenditures, ensuring compliance with grant requirements. Prepare financial reports for grantors and ensure proper documentation of all grant-related activities.
- Work with the Director of Development to ensure donor needs are being met at the highest levels and that internal controls are functioning efficiently and appropriately.
- Prepare all Board materials to two Board subcommittees: Finance and Executive, and serves on selected task force groups (e.g. Strategic Planning), as needed.
- Prepare and present summary financial information at meetings of the Board of Directors.
- Prepare cash flow projections and ensure adequate funding.
- Oversee budget development.
- Primary liaison with external investment manager regarding application of investment allocation decisions and monthly reporting.
- Oversee all insurance policies.
- Represent MUW at professional gatherings and civic events.
- In concert with finance staff, develop annual capital budget and identify and track maintenance needs.

Supervision of Director of Operations, Finance Staff and Contractors:

- Oversee and mentor direct reports, as well as the finance team as a whole, ensuring further development of a smoothly running and cohesive financial operation.
- Direct and support the Director of Operations with the financial accountabilities for the accounts payable.
- Work with Director of Operations in the development and implementation of internal fiscal systems, policies and procedures with an emphasis on improving internal controls and organizational effectiveness.

Fiscal and Legal Compliance and Controls:

- Ensure internal controls & systems are adequately designed and operating effectively.
- Oversee the annual financial statement audit and Single Audit, if required.
- Oversee all tax and other required filings.
- Participate in analysis of charitable giving programs and liaison with external auditor and legal counsel as required.
- Maintain banking relationships; negotiate credit facilities and ensure covenant compliance.

Knowledge, Skills, and Abilities:

- Bachelor's degree is required, preferably in Accounting, Finance or Business Management.
- CPA and/or Master of Business Administration strongly preferred.



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- A minimum of 3 years of experience in a senior financial role in a complex organization with multiple revenue streams and/or as an auditor of nonprofits.
- A collaborative and flexible operating style.
- Strong communication skills including experience and a disposition to explain finances and financial concepts to individuals with varying degrees of financial understanding.
- An understanding of or experience with a nonprofit organizations.
- Ability to read, analyze, and interpret complex documents; respond promptly and effectively to inquiries; write, prepare and deliver effective presentations to staff, board, and committee members, and the general public.
- Analytical skills, including modeling and the ability to apply logical thinking to a wide range of intellectual and practical problems.
- Proficiency with Microsoft Office Suite; experience with QuickBooks and Development software products a plus.
- Experience with federal, state and private grants is a plus.
- Proactive and well organized.
- An individual with the utmost professional and personal integrity.
- Outstanding collaboration skills through effective communication.
- Personal values consistent with Maui United Way mission.

Core Values:

- demonstrate integrity by being accountable for actions, keeping commitments, and speaking honestly and truthfully with others
- demonstrate an enthusiasm for professional development acquiring new skills and knowledge to enhance role.
- demonstrate a commitment to individual and team-based assignments
- demonstrate quality assurance by producing accurate and thorough work
- demonstrate interpersonal skills in dealing with others
- demonstrate valuing the diversity of others' opinions and experiences
- demonstrate sound reasoning and good common sense
- demonstrate the ability to meet and exceed customer expectations
- demonstrate active participation in departmental, team, and full-staff meetings

Disclaimer:

- This job description is intended to convey the essential functions of this position and it is not intended to be an exhaustive list of skills, duties, responsibilities or working conditions associated with the position.



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Compensation and Benefits:

- **Annual Salary:** \$90,000 to \$120,000, with the potential for performance bonuses.
- **Benefits:** MUW will pay 100% of the premium for individual coverage through the insurance provider that is insuring MUW employees for a given coverage period. 403(b) match up to 6% (effective after 90 days of employment)

Start Date and Employment Terms:

- **Proposed Start Date:** Immediately
- **Employment Type:** Full Time
- **Location:** Maui United Way Office in Kahului, Maui
- **Initial Review Period:** 90 days

Application Instructions:

By October 28, 2024, submit a cover letter and resume/CV through our online portal or by email to careers@MauiUnitedWay.org with subject line: "Chief Financial Officer Application." The cover letter should address your experience and expertise that would position you to further Maui United Way's work and share your specific financial expertise and how it is suited for our local Maui nonprofit.

Your signature on the cover letter shall also attest that you did not use Artificial Intelligence (AI) apps or programs to write your cover letter. The resume/CV should include at least three professional references with contact information.

Mahalo for your interest!