

Amazing Place Finance Director

Sorrell is pleased to partner with Amazing Place in its search for a new Finance Director. Amazing Place is a Houston nonprofit serving individuals with mild to moderate dementia and their caregiving families, health professionals, community organizations and congregations. Amazing Place has site based and virtual day programs as well as meal services and myriad education offerings for family members and caregivers.

Originally known as The Seniors Place, Amazing Place was first formed in 1996 based on the leadership of a visionary minister at St. Luke's United Methodist Church who saw the tremendous need for providing respite support and education to individuals and families impacted by dementia. He formed a founding committee comprised of members of St. Luke's and other nearby congregations to research and develop this program. They started in two converted classrooms at St. Luke's with three staff members serving three participants. It became a separate nonprofit organization in 1998, and as the number of participants grew over the years, the organization moved to its own building and eventually to a new state-of-the-art facility at 3735 Drexel Drive, where it is today.

Currently there are 15 local congregations that have joined together to form a collaborative Board of Directors to govern and guide the organization. With the anticipated expansion of a second Amazing Place facility in Katy, Texas, the organization also has established a West Council comprised of seven additional congregations. Amazing Place also has additional leadership support through Advisory Councils consisting of health professionals and other interested individuals.

Amazing Place's **Mission Statement** is Empowering Lives Disrupted by Dementia, and its **Vision** is Ending the Stigma of Dementia. Please see www.amazingplacehouston.org for more information.

Summary of the Position

Reporting to the Executive Director, the Finance Director serves as the Head of the Administrative Team, is a member of the Leadership Team and works closely with the Executive Director on financial oversight of the organization, strategic direction and organization administration. S/he has one direct report, a Finance Specialist, along with many collaborative relationships across all the departments.

S/he is responsible for developing, managing and overseeing the organization's financial operations, planning, budgeting, banking, accounting, controller, audit and reporting functions to support annual and strategic goals, in conjunction with the Finance Committee and Board of Directors. As an integral member of the Leadership Team, the Finance Director provides financial guidance, leadership and actionable recommendations to the Executive Director and other senior leaders.

The Ideal Candidate

Amazing Place is seeking a gifted leader, not merely an effective financial manager. S/he will need to have proven capabilities in the areas of fiscal strategy, asset management, financial management, investment management, banking, accounting, external relations, culture and change management leadership. The ideal candidate will be an experienced and entrepreneurial leader who is able to be a primary finance/operations partner to the Executive Director, provide financial leadership for an institution that aims to thrive within a challenging environment and be accountable for these functions.

The Finance Director ideally will have experience in financial and capital planning and reporting, banking, 501C-3 requirements and s/he will need to have the talent to integrate vision, strategy, and execution to move the organization forward. The ideal candidate will be willing to take appropriate risks and to seize opportunities while safeguarding Amazing Place's assets. Further, the ideal candidate will be a highly relational, hands-on leader with a deep passion for Amazing Place's mission and vision.

Essential Duties and Responsibilities

The Amazing Place Finance Director will perform the following essential duties:

- Assure protection for Amazing Place's assets through internal controls, reporting, compliance,

administration and systems.

- Oversee all financial and accounting functions.
- Keep the Executive Director and Finance Committee informed of all financial matters and provide advice on financial investments as well as opportunities or risks. Monitor markets, trends, and anticipate risk and opportunities.
- Oversee a variety of tasks involving oversight, recording, monitoring and reporting of financial transactions.

Internal Reporting & Controls

- Support the Board of Directors and Executive Director by providing appropriate reporting and analysis as required or requested.
- Oversee and develop a cash management plan, monitor all banking activities, and establish and maintain accounting policies and procedures, which will ensure efficient, economical, and segregated duties in operations.
- Oversee the functions of accounts receivable, accounts payable, payroll activities, fixed assets records, transportation of Participants, and all financial records generated. This position is the back up for these functions.
- Oversee and review reconciliations and closing of the general ledger.
- Oversee and review the monthly and annual financial reports for submittal to the Finance Committee, Board and other required entities.
- Prepare comprehensive financial budgets for approval and monitoring budget-to-actual monthly.
- Update annual budgets with current expectations.
- Oversee monthly invoice preparation for the Participant families.
- Handle confidential security information and responsibilities.
- Handle confidential information including, but not limited to, financial, personnel, participant and families, payroll, banking, auditing and board minutes with required discretion.

Compliance

- Ensure that all financial records are kept according to Generally Accepted Accounting Principles (GAAP), utilize financial data as an aid to management, and assure compliance with federal and state regulations especially as it pertains to 501C-3 organizations.
- Ensure, with the Executive Director and the Operations & Special Project Manager, that Amazing Place maintains compliance with the State of Texas and the City of Houston regulations. This includes proper preparation of all regulatory reports required to be filed with the federal, state, and local governments, including payment and filing of federal and payroll tax returns.
- Oversee and assist in preparing all necessary audit and 990 schedules and providing accurate information to outside auditors.
- Have a strong working knowledge of the Department of Aging Disability Services (DADS) state regulations and other City of Houston regulations.

Strategy, Planning and Management

- Assess and evaluate Amazing Place's financial performance with regard to long-term operational goals, budgets and forecasts, including the strategic plan and CapEx expenditures.
- Provide insight and recommendations that create operating flexibility in support of short-term and long-term strategic goals.
- Create and establish yearly financial objectives and KPIs that align with and maximize AmazingPlace's plan for growth.
- Instill a financial perspective to decision-making for accelerating improvements and achieving reliability in processes, products and services.
- Implement policies, procedures and processes as deemed appropriate to automate processes and increase working efficiencies.
- Attend staff, Finance Committee, and other required meetings and participate by assisting in ongoing strategic planning, as requested.

Administrative/Human Resources/IT

- Evaluate, identify, acquire and implement systems and software to provide timely and critical

financial and operational information. Oversee and manage external services vendors' performance and manage any contract renewals/adjustments.

- Serve as primary staff liaison with Insperty, the organization's PEO, which provides payroll, benefits, HR, training and compliance resources.

Staff Supervision and Mentorship

- Manage/supervise accounting staff in the preparation and analysis of monthly project accounting activity, financial reporting packages and other related financial projects.
- Mentor and develop the accounting team, managing work allocation, systems training, performance evaluations, and the building of an effective and efficient team dynamic.
- Create a culture of continuous improvement and lead in key work areas of efficiency, meaningful work, timely reporting to support all key decisions, and service to all stakeholders.

Other Duties

- Meet with the Scholarship Committee to help craft policies, present scholarship applications and determining how the granted scholarship affects the Participant's invoice.
- Meet with prospective Day Program families to review admission policies as they relate to billing, collections, and maintaining contact for collection purposes. The Finance Specialist also assists with this process. Provide support to the Development Department, regarding grant proposal information and gathering of data for both the proposal and the required reporting.
- Act as a liaison with the Board of Directors, the Finance Committee, Audit vendor, and other financial institutions.
- Represent Amazing Place at various meetings as requested by Executive Director. This may include donor, Board, and affiliate events.
- Serve as Table Host for the Day Program Participant Lunch one day per week.
- Other duties as requested by the Executive Director.

Preferred Skills and Technical Abilities

- Bachelor's degree and active CPA license preferred; MBA a plus.
- Minimum 10 years of professional experience; prior experience in nonprofit accounting preferred.
- Experience as part of a senior leadership team, people management and working within a small team environment.
- Comprehensive knowledge of GAAP (Generally Accepted Accounting Principles)/FASB (Financial Accounting Standards Board).
- Strong communication (written and verbal), interpersonal, advanced analytical and organizational skills a must; ability to effectively communicate with all stakeholders -- Board and executive management team, staff, partners, donors and program participants.
- Strong track record of hands-on experience in developing and managing financial & accounting function, and experience with financial analysis and modeling a plus.
- Expertise implementing and strengthening internal control systems that drive growth.
- Systems savvy and a desire to improve and automate the accounting and finance function.
- Maintains current industry, accounting and finance best practices.
- A high level of proficiency with accounting software and MS Office.
- Adaptability and experience with technology transformation/implementation.
- Experience in budgeting, cash flow analyses, and project auditing.
- Decisive, results-driven leader who thrives on early problem identification and achieves solutions in timely and supportive scenarios.
- Highly skilled in qualitative, financial, and operational metrics analyses and modeling.
- Proven ability to identify and minimize financial risks.
- Excellent analytical, reasoning and problem-solving skills.
- Demonstrated ability to be resourceful and adjust quickly, based on changing circumstances; proven track record of shifting priorities with creativity, innovation, and value creation.
- Forward thinking, anticipating what comes next, broadly and in specific areas such as technology.
- Maintains current CPR and AED Certifications.

Personal Attributes

Amazing Place's mission is to provide fellowship, memory care and wellness for adults with mild and moderate memory loss, and to support their families and the community. In order to fulfill this mission, the organization strives to hire employees who possess the following qualities. A successful candidate must:

- Possess the zeal to work for a nonprofit and alignment with the specific mission, vision and value system of Amazing Place.
- Approach the work with the mindset of a Servant Leader and a commitment to be a team player.
- Strive for the highest quality and standard.
- Demonstrate leadership ability, respect, empathy and consideration for others.
- Understand and be highly responsive to the unique needs of individuals and teams.
- Be flexible, trustworthy and motivational.
- Be hands-on, take-charge, decisive, results driven.
- Give high attention to details and timely execution.
- Possess strong ethics and encourage diversity of thought and tolerance.

Special Knowledge, Skills and Abilities Required

The successful Finance Director will possess solid organizational skills as well as intermediate to advanced computer/technology proficiency. S/he understands the concept of being a team player in a work environment where employees consistently come together for the greater good; s/he recognizes that the unpredictable nature of working with dementia patients could occasionally involve contributing more than your share of the work load to achieve a departmental or participant outcome; and s/he maintains a cheerful communication style, demonstrating the necessary patience to work well with persons who have mild to moderate dementia.

Supervisory Responsibility

The Finance Director shall carry out supervisory responsibilities in accordance with Amazing Place's policies and applicable laws. S/he shall directly supervise between one to two employees. His/her supervisory responsibilities shall include recruiting, training employees; planning, assigning, and directing their work; appraising performance; rewarding, and coaching employees; addressing complaints and resolving problems. In addition, s/he shall assist in the employee discipline process, coaching and performance management process.

Work Environment and Physical Demands

The work environment characteristics and physical demands described here are representative of those an employee encounters while performing the essential functions of this job and indicative of his/her ability to be successful. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision. While performing the duties of this job, the employee is regularly required to reach with hands and arms and talk or hear. The employee is regularly required to stand; walk and sit.

Compensation

Compensation is competitive and commensurate with experience. Attractive benefits package.

Application and Referral Process

Applicant review is currently underway and will continue until the candidate has been selected. To nominate or be considered for this position, please contact Laura Sorrell at laura@sorrellco.com / 713.854.5351 or Priscilla Plumb at priscilla@sorrellco.com / 281.224.0881. All inquiries will be held in confidence.

About Sorrell

Sorrell is a highly relational provider of executive recruiting. Our mission is to serve as partners with our clients to accelerate their efforts to attract, hire and retain talent that impacts the future of the organization. For more information, call 713.840.1870.