



Finance Director

Sorrell is pleased to partner with Amazing Place in its search for a new Finance Director. Amazing Place is a Houston nonprofit dedicated to its mission: *Empowering families facing the challenges of dementia and Alzheimer's & advancing brain health for all.* Amazing Place's Day Program, located inside its state-of-the-art wellness center, offers participants with mild to moderate dementia a place to thrive, where they are provided the best in health, family, and culinary services in addition to an evidence-based, meticulously planned curriculum. Alongside the Day Program, Amazing Place provides adults living with dementia, their families, and caregivers, as well as health professionals, congregations and the community-at-large with access to a full range of Family Caregiver Support programming (English and Spanish) and Brain Health Education initiatives. Over the last 28 years, Amazing Place has become a symbol of hope for so many whose lives have been disrupted by dementia. It has responded to the escalating diagnoses in the community and its family caregivers to enhance its mission to serve, support, and educate all in need.

History

In 1996, a Houston pastor recognized the growing impact of memory loss facing his congregants. Those with dementia needed a safe place for socialization and stimulation, and their caregivers needed support and respite. In response to this need, he established The Seniors' Place in two church classrooms, with three staff members and three participants. Today, Amazing Place serves more than 6,800 people through its Day Program for adults with mild-moderate dementia and its dynamic Family Caregiver Support and Brain Health Education initiatives.

Currently there are 16 local congregations that form a collaborative Board of Directors, along with five At-Large members to govern and guide the organization. With the expected opening of a second Amazing Place facility in Katy, Texas in the Spring of 2025, the organization also has established a West Council of Congregations comprised of 12 additional congregations. Amazing Place also has additional leadership support through its Advisory Council consisting of health professionals and other community leaders.

Amazing Place's goal is to be the leading provider of dementia education and support services to create confident caregivers allowing those diagnosed to age in place as long as possible. Please see www.amazingplacehouston.org for more information.

Summary of the Position

Reporting to the Executive Director, the Finance Director is a member of the Executive and Leadership Team and works closely with the Executive Director on financial oversight of the organization, strategic direction and organization administration. He/she has one direct report, a Finance Coordinator, along with many collaborative relationships across all the departments.

He/she 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. He/she 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 he/she 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 servant 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:

- Oversee all financial and accounting functions.
- Oversee a variety of tasks involving oversight, recording, monitoring and reporting of financial transactions.

Internal Reporting & Controls

- 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 and serve as a liaison between the Executive Director, the Finance Committee, and the contracted investment advisors regarding investment performance and investment account transactions as approved by the Finance Committee.
- 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 and maintain a record of all funds, including restricted and non-restricted funds. Appropriately calculate and record any and all transfers between funds.
- Work with both Development and Campaign personnel to maintain a multi-year record of campaign activities and balances.
- 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, that Amazing Place maintains compliance with the State of Texas and the City of Houston regulations.
- Oversee and assist in preparing all necessary audit and 990 schedules and providing accurate information to outside auditors.
- Have a 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 Amazing Place'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, Board and other required meetings and participate by assisting in ongoing strategic planning, as requested.

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

- Oversee the meeting with prospective Day Program families to review admission policies as they relate to billing, collections, and maintaining contact for collection purposes. The Finance Coordinator also assists with this process.
- Meet with the Scholarship Committee to help craft policies, present scholarship applications and determining how the granted scholarship affects the Participant's invoice.
- Provide support to the Development Department, regarding grant proposal information and gathering of data for both the proposal and the required reporting.
- Other duties as requested by the Executive Director.

Qualitative Dimensions of Position

Leadership

- Have the ability to accommodate others' needs and demonstrate flexibility
- Have the ability to multitask and remain composed even when under high stress
- Have the ability to maintain a positive and optimistic outlook
- Be team-oriented and flexible
- Exhibit confidence in self and others
- Inspire and motivate others to perform well
- Effectively influence actions and opinions of others
- Inspire respect and trust
- Accept feedback from others
- Provide vision and inspiration to peers and subordinates
- Give appropriate recognition to others
- Have the ability to coach others
- Display passion and optimism
- Mobilize others to fulfil the vision
- Must be team-oriented and flexible to act as a leader or follower

Communication

- Be persuasive and confident in oral and written communication
- Have the ability to listen and empathize with Team Members, Participants and Caregivers
- Demonstrate effective communication skills and build relationships between Participants, Caregivers, Volunteers and nursing/program area Staff.

Problem Solving

- Identify and resolve problems in a timely manner
- Gather and analyze information skillfully
- Develop alternative solutions
- Work well in group problem solving situations
- Use reason even when dealing with emotional topics

Quality

- Have the ability to easily use the more difficult features of Microsoft Office or be willing to accept training
- Demonstrate artistic abilities and innovation
- Look for ways to improve and promote quality
- Demonstrate accuracy and thoroughness

Judgment

- Have a demonstrated ability to accept accountability for decisions and actions
- Have the ability to consider safety and the consequences of actions
- Display willingness to make decisions
- Exhibit sound and accurate judgment
- Support and explains reasoning for decisions
- Include appropriate people in decision-making process
- Make timely decisions

Managing People

- Take responsibility for volunteers' activities
- Make oneself available to Staff
- Provide regular performance feedback
- Foster quality focus in others
- Improve processes, products and services
- Continually work to improve supervisory skills

Interpersonal

- Focus on solving conflict, not blaming
- Maintain confidentiality
- Listen to others without interrupting
- Keep emotions under control
- Remain open to others' ideas and tries new things
- Have the ability to maintain a positive and optimistic outlook

Delegation

- Delegate work assignments
- Match the responsibility to the person
- Give authority to work independently
- Set expectations and monitor delegated activities
- Provide recognition for results

Technical Skills

- Assess own strengths and weaknesses
- Pursue training and development opportunities
- Strive to continuously build knowledge and skills
- Share expertise with others

Education Requirements

- A college degree, with a business, finance or accounting major, OR comparable work experience in accounting

Certificates, Licenses and Registrations Required

- Certified Public Accountant Preferred
- Current CPR and AED Certifications or willing to obtain and maintain

Special Knowledge, Skills and Abilities Required

The ideal Finance Director has nonprofit and Fund Accounting experience, or the ability to train in these areas. He/she has knowledge and training both in payroll and HR functions, an understanding of the financial markets, and a familiarity with government grant transactions. He/she possesses solid organizational skills as well as intermediate to advanced computer/technology proficiency. He/she understands the concept of being a team player in a work environment where employees consistently come together for the greater good. Further, he/she recognizes that the unpredictable nature of working with dementia patients could occasionally involve contributing more than one's share of the workload to achieve a departmental or participant outcome. Throughout, he/she 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 the Organization's policies and applicable laws. He/she 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, he/she shall assist in the Employee discipline process, coaching and performance management process.

Competency

A successful candidate must be:

- Respectful
- A Team Player
- Flexible
- Trustworthy
- Empathetic
- Considerate

In addition, in order to perform the job successfully, an individual should demonstrate the following competencies:

Adaptability - Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.

Attendance/Punctuality - Is consistently at work and on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.

Dependability - Follows instructions, responds to management direction; Takes responsibility for own actions; Keeps commitments; Commits to long hours of work when necessary to reach goals; Completes tasks on time or notifies appropriate person with an alternate plan.

Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.

Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.

Quality - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.

Quantity - Meets productivity standards; Completes work in timely manner; Strives to increase productivity; Works quickly.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. 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.

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.

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 Priscilla Plumb at priscilla@sorrellco.com or 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.