



Director, Finance

Position Summary:

The Director of Finance manages the operational finances of the chapter. He/She coordinates the budget and operational issues with other board members, as well as administrative services. He/She assures that chapter operations are in compliance with ATD's Chapter Affiliation Requirements (CARE).

Time Commitment:

Term: Two years

Estimated Time Requirements per month:

- Attending board meetings: 2 hours plus travel time
- Conducting internal Audit with committee: 8 hours plus travel time (one-time annually)
- Attending monthly chapter meetings: 3 hours plus travel time
- Communicating with administrative office about routine issues: 2-4 hours
- Record keeping and financial book upkeep: 2 hours

Participation Expectations:

- Attend at least 8 of 10 board meetings annually -- most board meetings are virtual
- As a leader in the Chapter, attend at least 2/3 of Chapter events
- Attend ATD Regional Chapter Leader monthly conference calls
- Recruit and train replacement

Responsibilities:

Chapter Support

- **Budgeting**
 - Creates an annual operating budget and makes it accessible to members
- **Conducts Audits**
 - Audits income/expenses and cash-flow on a monthly basis to ensure chapter's sound financial status
 - Reports the results of financial audits to the board in a timely manner
- **Compliance**

- Ensures compliance with CARE
- Ensures chapter is in compliance with state and federal reporting requirements
- **Finance/Operations**
 - Oversees operations and finance for the chapter
 - Reconciles chapter bank accounts on a regular basis
 - Oversees the accuracy of record-keeping and reporting
 - Issues payment for invoices in a timely manner
 - Maintains chapter tax-exempt non-profit status
 - Ensures that the chapter maintains adequate insurance coverage

Board Participation (Voting Member)

- Participates in the development and implementation of short-term and long-term strategic planning for the chapter
- Provide a report on volunteer activities at the monthly Board meeting
- Maintain and update records relevant to the position for benefit of successor
- Before the end of Board term, recommend at least two potential candidates for the position
- Train successor in duties for this position during the transition period prior to successor's term of office
- Support and promote chapter affiliation requirements (CARE), and the strategic goals and action plans of the chapter
- Represent the chapter professionally and ethically in all business functions/organizational activities
- Attend and participate in board and chapter meetings
- Participate in other chapter events, committee meetings, and regional conferences as available

Key Collaborators

All Directors requiring assistance and, especially, the following:

- President
- Director, Professional Development & Programs
- Director, Marketing

Qualifications and Desired Characteristics:

- Required to be a member of ATD National and Valley of the Sun chapter
- Skilled in written and verbal communication, personal interaction, and problem-solving
- Ability to plan, organize, and execute activities as required by the position
- Ability to complete projects within established timeframes
- Ability to delegate tasks and monitor follow-through

- Strong analytical and networking skills
- Ability to fully participate in chapter programs and board meetings
- Strong advocate for the chapter