

DIRECTOR OF FINANCE AND ADMINISTRATION POSITION GUIDE

CAMPBELL & COMPANY

Campbell & Company is a national consulting firm that serves nonprofit organizations and institutions in all sectors, including education, environment, healthcare, human services, arts and culture, associations and membership organizations, and civic and public affairs. The firm is based in Chicago with regional offices in Southern California, Portland, San Francisco Bay Area, Seattle, and Washington, DC.

We are motivated by a desire to strengthen the nonprofit sector. You can see that commitment reflected in both our work and our personal passions—from mentoring others in the profession to volunteering in the community to serving on national boards. We are driven and willing to do what it takes to get the job done. We have high standards for ourselves and our teams, and we achieve those standards by helping one another do our best work.

We respect and value our colleagues' perspectives, and we see collaboration as an opportunity to learn from one another, support each other's growth and advance our collective knowledge. Our team-based approach enhances our work and is even built into our company's structure: as an ESOP (Employee Stock Ownership Plan), we are 100 percent employee-owned, giving every one of us a vested interest in the success of both our clients and our colleagues.

We are always looking to improve so we can better serve the nonprofit sector. That desire fuels our new growth strategy, which charts an ambitious path for national expansion in key regions and vertical sectors across the country. These objectives advance the core services that today's nonprofits need to be successful and support a growing team of professionals who bring passion and dedication to their work every day.

OUR WORK

For 42 years, we've worked with organizations at critical points in their growth and development, when our expertise and partnership approach can have a powerful impact. Today, we have four primary service lines: fundraising, communications, executive search, and strategic information services. We immerse ourselves in learning each client's culture, constituencies, and challenges, and we work with staff, board members, and other leaders to develop a coherent strategy for achieving the organization's goals.

Mission

To collaborate and innovate with people who change lives through philanthropic vision and action.

Vision

*To be the **partner of choice for nonprofit organizations**, nationally known for providing exceptional and creative service, distinguished by our commitment to our client relationships, and recognized for advancing the nonprofit sector as a whole.*

*To be the **firm of choice for talented professionals** seeking a great place to work where they can be well-supported, challenged, and fulfilled throughout their careers.*

Visit us



DIRECTOR OF FINANCE AND ADMINISTRATION

Our client engagements include work with distinguished organizations such as: Advocate Health Care (Chicago, IL); Alzheimer's Association (Chicago, IL); American Red Cross (Washington, DC); Chicago Community Trust (Chicago, IL); Chicago Symphony Orchestra (Chicago, IL); Environmental Defense Fund (New York, NY); Georgetown Visitation Preparatory School (Washington, DC); Goodman Theatre (Chicago, IL); Latin School of Chicago (Chicago, IL); Lyric Opera (Chicago, IL); Natural History Museum of Los Angeles County (Los Angeles, CA); Seattle Foundation (Seattle, WA); Seattle University (Seattle, WA); Smithsonian Institution (Washington, DC); The Nature Conservancy (Arlington, VA); University of San Francisco (San Francisco, CA); World Wildlife Fund (Washington, DC); and the Zuckerberg San Francisco General Hospital Foundation (San Francisco, CA).



Collectively, Campbell & Company consists of 70 staff members, including 40 in Chicago and the Midwest, three in Washington, D.C., six in California, two in Portland, 19 in Seattle, and three in other regions. Our consultants work in teams to provide the right balance of expertise, experience, and seniority for each client. Over time, each consultant has opportunities to work with and gain knowledge from every other consultant on our staff.

ABOUT THIS POSITION

The Director of Finance and Administration leads and is responsible for all finance-related operations of the firm, including payables and receivables, general ledger, relationship management with banks and other vendors, accounting for investments, budgets, and administration of the firm's ESOP. Additionally, the Director of Finance and Administration is responsible for human resource functions such as benefits administration, maintaining employee records, and management of the administrative and business office team. Finally, this individual is a liaison to the firm's technology consultants and makes recommendations regarding the firm's technology needs. The Director will collaborate with a variety of internal constituents, including the CEO, Executive Vice Presidents, and division heads. The Director will be charged with identifying opportunities to improve efficiencies. S/he will need to analyze existing processes and systems and work closely with the CEO to streamline current systems, leverage information technology, and ensure policies and procedures that provide maximum benefit to all parties involved.

This person reports to the CEO and serves as a member of the Management Committee, along with two Executive Vice Presidents, a Vice President, and the Directors of Communications Consulting, Strategic Information Services, Executive Search, Marketing and Business Development, and Strategic Priorities. The Director of Finance manages the administrative team of three staff members that includes an Assistant Director, Technology Associate, and Administrative Manager & Senior Executive Assistant. This position is located in Campbell & Company's Chicago headquarters.

DIRECTOR OF FINANCE AND ADMINISTRATION

RESPONSIBILITIES

The Director of Finance and Administration's responsibilities will include the following:

FINANCE & ACCOUNTING

- Manage and administer the firm's Employee Stock Ownership Plan (ESOP), including ensuring that employees are informed and updated on the plan's benefits.
- Maintain a documented system of accounting policies, procedures and controls.
- Manage all accounts, ledgers, and reporting systems, ensuring compliance with appropriate GAAP standards and regulatory requirements.
- Manage banking relationships and initiate appropriate strategies to enhance cash positions.
- Consistently present financial and management reports in an accurate and timely manner.
- Manage and track the performance of invested assets in keeping with policies and investment guidelines.
- Coordinate the provision of information to external auditors as needed.
- Comply with local, state, and federal government reporting requirements and tax filings.
- Manage payroll and insurance.
- Review all contracts and letters of agreement, and seek legal counsel where appropriate.
- Work with senior leadership to maintain internal controls and safeguards for receipt of revenue, costs, and expenditures.
- Develop and lead the budgeting process for the firm and all divisions.
- Ensure that regular bank reconciliations are completed.
- Oversee accounting operations, including optimizing the organizational structure for achieving the division's goals and objectives.
- Lead special projects such as reviewing possible acquisitions and negotiation, and execution of office leases.

HUMAN RESOURCES

- Hire, train, manage, and evaluate the business office team.
- Hire the firm's administrative team and oversee all office operations.
- Ensure compliance regarding employee records and human resource policies and procedures.
- Serve as the firm's benefits administrator.
- Manage the relationship with Campbell & Company's human resources provider.
- Serve as an advisor to the CEO and the senior leadership of Campbell & Company regarding issues related to people and the administration of human resource policies and programs.
- Leverage the strengths of current firm members, help to clarify roles and responsibilities, and support use of training programs in order to maximize and reach optimal individual and organizational goals.

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TECHNOLOGY

- Serve as the firm's liaison to technology consultants, and make recommendations on the firm's technology needs.
- Ensure that firm members have the proper technology resources, including hardware, software, and training.

QUALIFICATIONS

The Director of Finance and Administration will bring the following qualifications:

- Seven or more years of related experience in finance and accounting, including experience managing accounting staff; experience in a professional services firm would be an advantage.
- Experience with ESOP administration would be a distinct advantage.
- Highly self-motivated, with demonstrated leadership abilities.
- Exceptional management skills.
- Success developing and monitoring systems to optimize internal operations.
- High attention to detail.
- Collaborative, with an accessible, visible, and flexible management style that inspires trust.
- Strong analytic, organization, and problem solving skills that support and enable sound decision making in a complex organization; demonstrated resourcefulness in setting priorities and guiding investment in people and systems.
- Direct and concise communication and presentation skills; an active listener.
- The ability to use technology to produce data for quick and effective financial and management reporting.
- Ability to translate complex financial concepts to individuals at all levels of the company.
- Strong customer service orientation.
- A bachelor's degree is required; a master's degree in a related field such as Business Administration, Accounting, or Finance would be desired.



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APPLICATION

This search is being conducted by Marian DeBerry, Senior Counsel, and Dan Nevez, Senior Consultant. Inquiries, applications, and nominations should be directed to:

Dan Nevez

Senior Consultant, Executive Search

dan@campbellcompany.com

(312) 896-8901 direct

Campbell & Company is an Equal Opportunity Employer.

We are proud to partner with nonprofits to advance justice, opportunity, and equity throughout our society – and we bring this same commitment to our practices and culture as a company. We seek people to join our firm who share this sense of purpose and will bring a diversity of perspectives and experiences that will enrich our team and clients.

Individuals from all backgrounds are encouraged to apply.