



Financial Consultant Job Posting 2022

Our Mission: Nonprofit Enterprise at Work ([NEW](#)) inspires and equips mission-driven people, organizations and communities to realize their visions of a just and thriving society.

Our Vision: Empowered leaders, flourishing nonprofits, and vibrant communities.

Our Values: Because we believe that communities, organizations and people are filled with potential waiting to be unleashed

- We **Honor** the rich diversity of people, experiences and ideas.
- We **Invest** in our people, clients, and communities.
- We **Seek to Understand** by promoting lifelong learning for ourselves and our clients.
- We **Collaborate** by supporting each other as team members and through partnerships.
- We **Innovate** by encouraging creativity and finding solutions.
- We **Deliver Exceptional Service** - every time.

Purpose of Position:

NEW seeks a **part- or full-time Financial Consultant** to provide financial expertise to our clients as part of NEW's Financial Services practice.

NEW's Financial Services, within NEW's larger work, increases understanding of the crucial role that financial management holds for the success of mission-based organizations in the success of their work. A sound understanding of financial health and transparent financials that all stakeholders can understand are necessary for responsible fiscal stewardship and achieving an organization's goals.

Financial Services clients are often past, current, or future participants in other NEW services. Financial Services team members often collaborate and contribute to work done across all of NEW's services and approaches, as well as making contributions to NEW's culture and internal efforts to increase justice and equity.



Organizational Relationships:

The Financial Services team consists of part- and full-time Financial Consultants who work collaboratively and by consensus. Each consultant leads work on segments or phases of services as a whole, as well as taking accountability for particular clients or client projects. Leadership purview may include areas such as: client intake & onboarding; standards documentation & development; internal staffing & budgeting. All team members can expect support from and should anticipate giving support to the entire team.

With work spanning all of NEW's approaches (Learning Communities, Consulting & Coaching, Managed Services, and Administration), Financial Consultants can expect to collaborate around goals and objectives within those approaches, and with all NEW staff. Financial Services clients are overwhelmingly likely to have engaged with other services within NEW in the past or in the near future, and a strong, up-to-date familiarity with all of NEW's services, maintained through good communication across approaches as well as services is crucial for this.

The number of Consulting & Coaching client projects a given staff member may undertake can be expected to fluctuate on a month-by-month basis, and is dependent on that team member's other standing responsibilities, current client demand, and particular expertise.

Participation in both internal and externally-facing financial Learning Communities resource development projects is ongoing throughout the year.

Client bookkeeping Managed Services responsibility is matched to the number of hours available within a given team members' schedule:

- Full-time 1.0 FTE Financial Consultants have a capacity of approximately 47 ongoing monthly bookkeeping hours across their clients;
- .75 FTE will have a capacity of approximately 30 hours per month;
- .66 FTE will have a capacity of approximately 21 hours per month;
- .50 FTE will have a capacity of approximately 12 hours per month;
- .33 FTE will have a capacity of approximately 6 hours per month.

Administrative work requires largely the same number of hours of all team members, regardless of part- or full-time status.

This is primarily a remote position, but a candidate's preference for in-office work may be accommodated.



Salary and Benefits:

The Financial Consultant base salary is \$48,000 per year, prorated based on FTE percentage. This role can be **part- or full-time**, 0.33 to 1.0 FTE, and is **non-exempt by default**.

All team members are eligible for flexible time off, 11 annual holidays, and annual support of their professional development. Team members working 30+ hours have access to a comprehensive benefits package, including medical and dental healthcare and a SIMPLE IRA match.

This role engages with all of NEW's approaches:

Percentages of work distribution across approaches may be applied to the number of hours worked by a given team member per their employment agreement.

Learning Communities: *Build a learning network of people that are leading change on personal, interpersonal, organizational, and systemic levels within their organizations and communities. Up to **10%***

- Learning community support & facilitation. This is currently limited to the *Road to Resilience* cohort program, which is expected to begin a third cohort in January 2023. Work with members of the Learning Communities team to develop agendas and create appropriate content providing financial education to cohort participants.
- Develop and make available educational resources via NEW's website to support the financial literacy of small nonprofit organizations throughout NEW's community. Topics may grow to include: basics of interpreting financial reports, NEW's bookkeeping style, creating cash flow projections, the interrelationship between year-end financial reports and IRS 990 filings, considerations in establishing a fiscal year, how to interview a prospective tax or audit accountant, and appropriately filing IRS 1099 forms.

Consulting & Coaching: *Engage leaders and organizations with transformative capacity building services. Up to **30%***

- Provide financial consulting to nonprofits, providing assessments of an organization's financial condition, processes and practices, and recommendations based on best practices and a client's unique needs.



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- One-on-one or small group training, including orientation to nonprofit financial concepts & responsibilities for current clients as part of their ongoing services as well as training-only engagements.
- Attend client organization Board & Finance Committee meetings to support client staff and to advise on financial questions.
- Liaise with client accountants for IRS 1099, 1023, and 990 support as needed.
- Evaluation of audit readiness & liaison services with a client's auditor
- Grant application & reporting assistance

Managed Services: *Provide essential back-office services, tools and space that enable social change as well as opportunities for collaboration and connection. Minimum 25%*

- Ongoing client Bookkeeping services, including:
 - Processing and recording transaction information as submitted by clients, proactively seeking to understand their mission, priorities, and financial health in the service of improving their ability to flourish.
 - Preparing monthly financial reports & statement reconciliations for client accounts, delivering exceptional service.
 - Conducting historical bookkeeping work to resolve inconsistencies and other problems, at the request of the client and on an hourly basis.
- One-time interventional work to configure client books and reports
- Transition services for organizations wishing to move their current books from another platform to QuickBooks Online Plus, as part of an independent engagement or in partnership with NEW's IT service.
- NEW's Fiscal Sponsorship program, including:
 - Evaluate applicants for this service, as well as evaluating NEW's current capacity, prior to making a recommendation on whether to put this project forward for consideration to the Finance Committee. This encompasses ensuring strong financial stewardship on the part of the project, as well as alignment to NEW's Mission and Vision.



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- o Liaise between NEW and the sponsored project to carry out administration of donated funds, facilitating funding receipt and disbursement, and preparing client reporting on a regular basis.

Administration: *Establish and maintain operational infrastructure, processes, and a workplace culture that supports our team's work and collaboration with partners. 35%*

- Prepare proposals and service agreements for Financial Services clients, ensuring consistent quality and equitable pricing.
- Develop new client relationships for the Financial Services practices.
- Seek evaluation & feedback from clients and partners across all financial services, and employ that feedback to make improvements to services.
- Refine NEW's bookkeeping style guide and best practices specific to our clients; create systems that function in the service of financial transparency, good stewardship, and increased knowledge for our clients and for the greater community of nonprofits.
- Pursue professional development and enrichment opportunities to stay current and advance knowledge in the areas of nonprofit financial practices, as well as in topics related to NEW's Mission, Vision, and Values.
- Work collaboratively within NEW to help the organization strive toward meeting its Mission and Vision, particularly in developing strategies to ensure positive impacts on the financial health of our communities.
- Play an active role in promoting and creating an organizational culture consistent with NEW's Mission, Vision and Values.

Frequently cited statistics note that communities of color, women, and other marginalized groups apply to positions only if they completely meet qualifications. NEW encourages you to upend those statistics and apply to this position. We excitedly anticipate your application.

Position Criteria

- Ability to manage multiple priorities and work cooperatively with others in a fast-paced, changing environment.
- Ability to accomplish tasks autonomously, accurately, and efficiently.
- Strong administrative and organizational skills.



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- Strong interpersonal skills, including excellent written and verbal communication.
- Demonstrated ability to work effectively with individuals and groups from a variety of identities, cultures, backgrounds, ideologies, populations, including personal and social orientations (e.g. nationality, race, ethnicity, religion, gender, sexual orientation, ability, class, and other social identities)
- Enthusiasm for working in high-performing , collaborative, constructive peer groups.
- Ability to apply strategic thinking to achieving community impact and progress toward NEW's Mission and Vision.

Technical Competencies:

- Familiarity and comfort with Microsoft, Google Suite and working in 'cloud' environments is important. Internet access is required.
- Attention to detail and willingness to reflect and learn is an important competency for this position.

Behavioral Competencies:

- Service Oriented – Has a heart to serve; provides helpful and timely customer service in and out of the organization; enthusiastically embraces our value of 'exceptional service' when working with colleagues and customers.
- Values Difference – Honors diversity of ideas, experiences and identities within a team and client base and seeks different perspectives to guide decision making.
- Communication – Expresses ideas and thoughts clearly and effectively; able to form strong working relationships with colleagues and others; able to work successfully with diverse individuals and groups.
- Team Player – Prioritizes the needs of the organization above other considerations; assumes roles outside scope of job description when necessary to keep organization running smoothly and to help meet customers' needs; treats colleagues like customers.
- Leadership and Initiative – Comfortable working independently to reach program goals and solve problems. Willing to embrace professional growth through internal coaching and external training.



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- Innovation and Problem Solving – Able to secure relevant information to identify key issues or problems and recommend viable solutions; able to adjust activities and goals based on changing circumstances.

NEW's Statement on Diversity:

We believe that our mission is most effectively fulfilled through a commitment to inclusiveness and a sense of belonging as core values and practices. We maintain that building and sustaining diversity requires an ongoing commitment to inclusion that must find full expression in our organizational culture, values, norms, and behaviors. We aim to lead by example, viewing and encouraging diversity as a fundamental and abiding strength, the nonprofit sector in Southeast Michigan and beyond.

NEW strongly values equity and believes in a just and fair society where all can participate, prosper, and reach their full potential. We work towards a more inclusive world and as such we are an equal opportunity employer and do not discriminate against any employee or applicant for employment because of race, skin color, ethnicity, religion, gender, sexual orientation, national origin, disability, age, marital status, military status, pregnancy, or parenthood. NEW is committed to maintaining a diverse and multicultural working environment.

To apply for this position, please submit your resume and cover letter to amorris@new.org.

This position will be open until filled; initial applications will be reviewed at the end of business July 8, 2022.