

POSITION SPECIFICATION

The Chief Financial and
Administration Officer



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SNAPSHOT

Position Title: The Chief Financial and Administration Officer

Reporting To: Executive Director

Location: New York, New York

Website: <https://www.universitysettlement.org>



UNIVERSITY SETTLEMENT

University Settlement partners with 40,000 New Yorkers on the Lower East Side and in Brooklyn every year to build on their strengths as they achieve healthy, stable, and remarkable lives. For over 130 years, we've collaborated with our neighbors to pioneer highly effective programs that fight poverty and systemic inequality.

Established in 1886 as the first Settlement House in the United States, we bring the values of that movement into the 21st century by meeting New Yorkers where they live, listening deeply to all perspectives, engaging with every individual holistically, and creating space for people to organize. Joining together with our neighbors to advocate for justice and equality, we help build community strength.

We work with New Yorkers of all ages. We infuse a commitment to civic engagement, equity, and communal action into each of

our programs, which include early childhood education, mental health and wellness, benefits assistance and eviction prevention, adult literacy and education, healthy aging, community and recreation centers, performing and visual arts, and youth development.

Learn more at

www.universitysettlement.org

Mission

University Settlement's mission is to empower families by building on their strengths and knowledge through the provision of comprehensive quality services that meet current needs, innovative programs that anticipate future needs, and advocacy on behalf of families.

Values

Excellence

Integrity

Mutual Accountability

Dignity

Inclusiveness



Programs

Early Childhood -Every year, we support 1,500 young children and families with a spectrum of education and care services including center-based learning, neighborhood-based family childcare, and home-based assistance.

Advocacy / Community Action -We work with and on behalf of community members to advocate for social justice, secure access to resources, and support policies that empower New Yorkers to achieve healthy, stable, and remarkable lives. Key issues include access to safe housing, healthcare, and quality education.

Housing Stability -Our eviction prevention program provides New York City community members with housing case management, counseling, and financial management services, all of which help families steer clear of eviction crises and preserve their affordable homes.

Youth Development - Through 17 afterschool sites, we offer programming to nearly 4,000 youth at the elementary, middle, and high-school levels annually. Our approach is rooted in positive youth development and social emotional learning frameworks that build students' self-awareness, self-expression, and self-management skills.

Mental Health - We offer a range of services in both traditional and nontraditional settings in order to reach residents across our neighborhoods, in whatever capacity they are most comfortable, offering "right fit" services to clients seeking emotional and behavioral support.

Creative Arts - Recognizing art as a powerful tool to build the social wellbeing of communities, we offer two distinct, transformative arts programs. The Creative Center harnesses the healing power

of art, connecting with older adults, patients and survivors, and healthcare staff. The Performance Project works to build equity in the arts by facilitating collaboration between artists and recent immigrants, seniors, and public housing residents.

Literacy - 400+ low-income, immigrant adult community members from the five boroughs access our fully integrated 10-month English literacy and civics education program annually, acquiring communication, decision-making, and life-long learning skills they need in their roles as family members, citizens, and employees.

Older Adults - We engage over 2,100 low-income seniors annually through a network of services including meals, health, wellness, and recreational activities, case assistance and management, housing counseling, and referral resources. Services are offered at four Manhattan sites, or through targeted support and technology for homebound seniors.

What is our impact?

University Settlement is:

- Strength-based - Community-based-
Holistic - Integrated across programs





78%
of homes are
stabilized



87%
of seniors
reported better
mental and
physical health



96%
of students
learned English



78%
of youth are
connected and
making progress
toward their
future



84%
had their
mental health
stabilized

Executive Leadership



Melissa Aase, M. Div., MSW, Executive Director, University Settlement

Melissa Aase assumed the role of Executive Director in January 2013. She has worked at University Settlement since 1992, as a social work student doing welfare rights organizing, and then as case manager and supervisor for youth development, employment, and homelessness prevention programs, then as Director of Project Home for seven years and Director of a sleep-away summer camp for two. From 2003 to 2012, she was a part of the senior management team as the Director of Community Development, where she oversaw the Houston Street Center, Older Adults Program, Project Home, and The Creative Center, as well as new community, strategic partnerships, and intra-agency projects. Ms. Aase also serves on the board of the International Federation of Settlements and Neighborhood Centers and is the past Executive Director of that organization, a membership organization representing over 11,000 neighborhood centers worldwide. She is a member of the Women's Leadership Council since its inception, and a board member of the United Neighborhood Houses of New York, the federation of 42 settlement houses across New York State. She has a Master of Divinity from Union Theological Seminary and Master of Social Work from Columbia University. Prior to working at University Settlement, she managed a small homeless shelter, and worked in public policy and community organizing positions in New York and in her home state, Washington.



Diversity Statement

University Settlement is committed to fostering, cultivating and preserving a culture of diversity, equity, inclusion and belonging. All staff are a part of this work. University Settlement has been on an explicit journey to become an anti-racist institution for the last five years. This is a commitment at every level of the organization, beginning with the board of directors. We are a large, multi-service settlement house that works with community members of all ages and in many disciplines to build stronger, vibrant neighborhoods. Working against racism and other structures of oppression that deny access, opportunity, equity, health and whole personhood is completely aligned with our mission.

THE OPPORTUNITY

University Settlement is seeking a Chief Finance and Administration Officer (CFAO), as it unwinds a long-standing merger with The Door. Presenting a challenging and exciting opportunity to lead the financial and administrative management of this 135-year-old organization, this position strives to support the dynamic impact the organization continues to provide its target communities.

The successful candidate will present a robust vision for top caliber administrative execution by building the necessary teams and strategies that promote the organization's continued operational health. As CFAO, the position will provide a critical role in partnering with the Executive Director, Board of Directors, Executive Program Leadership, Human Resources, and Development to attain greater success that incorporates collaboration and a growth mindset. A tremendous opportunity for a skilled finance and administrative leader, this position should scale the external capacity of a well-respected, high-impact organization like University Settlement.

Responsibilities Management and Oversight

Finance

- Plan, develop, organize, implement, direct and evaluate the organization's fiscal, regulatory, and administrative function and performance.
- Manage the agency's overall budget, facilities, information technology, administration, and finances.
- Evaluate and manage the finance and accounting structure and team, as well as administrative personnel and plan for continual improvement of the efficiency and effectiveness of the group, while providing individuals with professional and personal growth.



- Create and maintain a culture of trust and integrity and demonstrate a high standard of adherence to the University Settlement's values.
- Provide guidance and leadership on the internal control policies, processes and systems required to manage the organization's financial and administrative operations in accordance with Generally Accepted Accounting Principles (GAAP).
- Manage and coordinate the annual audit process with the external audit firm. Distribute and present audit report to the Board Audit Committee and Board of Directors.
- Oversee all contracts and Medicaid reimbursements to ensure documentation is in order and that all reimbursements/payments are fulfilled within the required time.
- Manage Medicaid modelling, projecting, and billing.

Administration- IT, Data, Facilities

- Review current systems with departmental leaders and support strategic decision-making to further implement or change key systems (Intacct, ADP, Raiser's Edge, Salesforce, RemedyForce, etc.)
- Bring strategic thought to different capital projects surrounding the current three buildings University Settlement owns (including one historic building), and many other properties where we work.
- Manage the facilities and data / communications infrastructure at the 26 additional sites including NYCHA buildings.
- Support additional leasing and other real estate decision-making as needed.
- Work closely and partner with the Program leaders to ensure they have the funds and resources available to deliver programs to their communities and are in compliance with contracts.
- Work with a talented Director of Data, Business Operations and IT to ensure University Settlement has the resources and pathways to deliver high quality programs to their communities, including growing the capacity for impact evaluation.
- Review and implement selected recommendations from recent strategic plans for the organization, for the Finance department, and for IT.

MISSION CRITICAL OBJECTIVES (First 6-12 Months)

- Build and assess the current team and define the scope of work to achieve financial stability and confidence from the organization and the board. Coach, mentor, and develop the current team to deliver accurate, timely reports to the Board, program team and the Executive Director.
- Hire and develop a diverse team of talented professionals to manage the finance and administrative operations of the organization.
- Evaluate the current systems including Intacct (accounting system) and Avid Exchange (accounts payable system) and others as to their functionality and efficiency. Make necessary change to increase usage, and accuracy.
- Build relationships across all departments increasing collaboration and efficiency to benefit the communities and clients of University Settlement.
- Create and set standards of communication across all departments on budgets, expenses, reimbursements, and funding.



THE INDIVIDUAL

The CFAO will be a strategic thinker who has a collegial and collaborative management and engagement style and is experienced with a complex and dynamically evolving, not-for-profit human services organization. The CFAO must have significant experience with managing change in the areas of nonprofit finance, facilities, data, business operations and technology. The successful candidate must work collaboratively and in a spirit of mutual trust with management and employees across the organization, set the tone for fiscal responsibility and controls, and encourage and model best practices in financial management. It is critical that the CFAO be capable of integrating smoothly into the senior management, adding new perspectives and insights into the organization's diverse culture.

Professional Experience + Qualifications

- 10+ years in progressively expansive financial leadership roles, with strong understanding of non-profit accounting, including the management of non-profit audits, budget planning and management for a nonprofit organization, financial reporting, government contracts, the annual audit process, and experience in a leadership capacity.
- Proven track record of improving processes across both finance and administration, bringing greater efficiency and effectiveness to an evolving organization, leveraging technology as appropriate.
- Experience with evaluating and implementing accounting and data systems; analytical tools, as well as financial and administrative software.
- Strong problem-solving and creative skills with the ability to exercise sound judgment and make data-driven decisions based on accurate and timely analyses.
- Experience leading capital projects and managing multiple buildings and sites.
- Ability to manage many diverse yet concurrent projects and responsibilities; able to multi-task and prioritize within a fast-paced working environment.
- Excitement about the opportunity to work hard in a mission driven, business-minded environment with high energy to build something incredible. Commitment to the social justice mission, and to shared leadership on diversity, equity, inclusion and belonging in all aspects of our work.

Management Style + Personality Attributes

- Ability to effectively manage change and lead through ambiguity.
- Proficiency in working effectively on a team or independently.
- Collaborative work style that motivates and empowers others to be their best.
- Exhibits strong judgement under high stress situations.
- Entrepreneurial and a self-starter with the ability to delegate.
- Possess excellent interpersonal skills that are reflected in an ability to interact professionally, build trust, and that model the values of the organization.
- Possess a strong sense of integrity and ethics.
- Sense of humor and participation in community-building is appreciated!



Education + Certifications

- Bachelor's Degree required, MBA or master's degree preferred.
- CPA preferred (but not required)

CONTACT INFORMATION

Leveraging deep vertical experience, innovative thinking, and proven time-saving methodologies, McDermott + Bull challenges the norm and thrives in the recruitment of difficult-to-find VP to C-Suite executive talent. We value a personalized service model while having the resources and capabilities of the world's largest search firms. With experienced partners in the United States, Canada, and Europe, we are the trusted retained search advisor for empowering change on behalf of private and public companies, nonprofit organizations, private equity firms, and their operating companies.



Executive Search Team



Sue Waterbury, Managing Director

347.923.7087 | swaterbury@mbexec.com

Sue Waterbury serves as a Managing Director at McDermott + Bull in the New York office, where she leads East Coast business development, with a practice focused on the nonprofit sector, family offices, and family foundations.

She has become a trusted advisor to senior executives and trustees on hiring leaders and developing corporate culture. Prior to her career in search, Sue spent two decades in senior sales positions within the emerging market finance sector working as Vice

President of Deutsche Bank and Goldman Sachs.

Sue serves on the Advisory Board of Citizens Committee for Children and was one of the founding board members of EMPOWER. Sue resides in New York City and East Hampton and is an avid golfer. She has a BA in French and psychology from Villanova University.



Allison Cox serves as an **Executive Recruiter** for McDermott + Bull and works closely with the Managing Directors to source and recruit executive talent for clients. She has a background in information technology, workforce solutions, and retail management and has successfully supported a variety of talent needs for Fortune 100 companies, Startups, Nonprofits, and more. She is a proactive facilitator of high value, synergistic relationships.

Allison earned a bachelor's degree from Indiana University in communications and culture. She currently resides in Huntington Beach, California and enjoys water sports, and off-road adventures.



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2 Venture, Ste 100 | Irvine, CA | 92618

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