



Chief Financial Officer



UMOS has partnered with Spano Pratt Executive Search to identify the Chief Financial Officer. For a confidential conversation and to learn more about this opportunity please contact Spano Pratt Executive Search.

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The Organization

UMOS is a non-profit advocacy organization that provides programs and services which improve the employment, educational, health and housing opportunities of under-served populations. In the past five years, the organization has experienced significant growth. Today, UMOS is successfully delivering a portfolio of diverse programs and managing grants resulting in an operational budget of nearly \$70M.

Contributing to that growth is the recent success in winning a \$25 million per year Migrant and Seasonal Head Start grant to serve children and families in the Rio Grande Valley area in South Texas, making The Child Development Division the largest program division within UMOS.

At the same time, the Workforce Development Division continues to expand in market share throughout Wisconsin making UMOS the largest nonprofit workforce development contractor in the state and the UMOS Social Services Division, with its nine program components, continues to make strides in advancing the position of UMOS as a performance based, data-driven, customer focused organization.

UMOS is well positioned to succeed in 2022 and beyond. For more information on UMOS go to www.umos.org.



Programs

The UMOS Child Development Division provides children a head-start in life by delivering comprehensive, high-quality learning and education, while providing an environment for family support.

The Workforce Development Division, consist of Wisconsin Works (W-2) Transitional Jobs, Transform Milwaukee Jobs Program, TechHire and the National Farmworker Jobs Program....

The Social Services division is comprised of 10 program components: UMOS Latina Resource Center's domestic violence, sexual assault, and human trafficking supportive services, Health Promotions' HIV Testing, Prevention and Counseling, Syringe Exchange, and the Hispanic Tobacco Prevention Network (HTPN) of Wisconsin, Farm Labor Housing, Home Energy Assistance, Food Pantry and the UMOS Community Learning Center.

Position Profile

The position serves as a strategic partner to the leadership team providing input to position UMOS for sustainable and successful financial performance. The Chief Financial Officer is responsible for the overall financial operations and management of the agency's fiscal department, its procedures and policies; and holds responsibility for implementation and maintenance of financial controls, accounting systems, and financial records safeguard.

DUTIES:

1. Serves as the organization's finance and accounting subject matter expert to internal UMOS department leaders and the UMOS board finance committee.
2. Directs all activities and fiscal responsibilities of the agency's division of finance; implements and maintains an accounting system which addresses the agency's financial responsibilities, safeguards, and controls necessary to carry out all financial activities; responsible for carrying out all general auditing and internal financial strategies of the agency's operations.
3. Maintains budgeting systems which provide control of expenditures made to carry out activities, directly and indirectly related to program operations; as well as other activities relating to investments, construction, and other matters.
4. Will conduct operational effectiveness reviews to ensure functional or project systems are applied and functioning as designed. Will develop or update functional or operational manuals outlining established methods of performing work in accordance with organizational policy.
5. Responsible for devising and installing special accounting systems and related procedures where standardized system does not apply; conducts survey of operations to ascertain needs of programs, departments, and organizational functional areas.
6. Conducts continuing assessments of the effectiveness of controls, accuracy of financial records, and efficiency of operations and prepares reports and recommendations for management.
7. Analyzes data obtained for evidence of duplication of effort, extravagance, fraud, or lack of compliance with laws, government regulations, and management policies or procedures. Prepares reports of findings and recommendations for management. Will conduct special studies for management, such as those required to discover mechanics of detected fraud and to develop controls for fraud prevention and improvement of internal controls.
8. Plans study of work problems and procedures, such as organizational change, communications, information flow, integrated service delivery methods, productivity, or cost analysis. Gathers and organizes information on problems or procedures including present operating procedures. Analyzes data gathered, develops information and considers available solutions or alternate methods of proceeding. Organizes and documents findings of studies and prepares recommendations for implementation of new systems, procedures, or organizational changes.

9. Correlates appropriations for specific programs with appropriations for divisional programs and includes items for emergency funds. Reviews operating budgets periodically to analyze trends affecting budget needs.
10. Analyzes past and present financial operations and estimates future revenues and expenditures to prepare budgets.
11. Analyzes records of past and present operations, trends and costs, estimated and realized revenues, administrative commitments, and obligations incurred to project future revenues and expenses, using computer systems.
12. Consults with unit heads to ensure budget and expenditure adjustments are made in accordance with program changes in order to facilitate long-term planning. Directs preparation of regular and special budget reports to interpret budget directives and to establish policies for carrying out directives.
12. Advises management on matters such as effective use of resources and assumptions underlying budget forecasts. Interprets budgets to management. Will plan and oversee development and installation of manual or computer-based budgeting system. Will assist in financial analysis of proposed projects to develop capital improvement and operating budgets.
13. Prepares comparative analyses of operating programs by analyzing costs in relation to services performed during previous fiscal years and submits reports to President/Chief Executive Officer with recommendations for budget revisions.
14. Testifies regarding proposed budgets before examining and fund-granting authorities to clarify reports and gain support for estimated budget needs. Administers personnel functions of financial management department, such as training, work scheduling, promotions, transfers, and performance ratings.

Professional Experience

- Bachelor's Degree for an accredited university in Accounting or Business Administration with a major in accounting.
- Certified Public Accountant (CPA) or Certified Internal Auditor (CIA) designation through national professional certification associations or societies and a member in good standing with a state association or society.
- A minimum of eight years combined experience in two professional areas is required: (a) a minimum of five years' experience in providing audit, internal audit, or government audit services (Level I and Level II) in a certified public accounting firm or a governmental unit; and, (b) a minimum of three years' experience in providing management consulting, budgeting, financial planning in public or private sector assignments.
- Demonstrated ability in developing corporate and programmatic budgets in a team-based organizational development environment.

- Documented training and demonstrated capabilities in customizing, installing, and managing computerized accounting systems as well as implementing staff training plans.
- Experience with government accounting, grants and nonprofit program financial analysis.

Locations

This position is located at the corporate headquarters in Milwaukee, WI: UMOS Center • 2701 South Chase Ave. • Milwaukee, WI 53207. States served include:
Arkansas | Florida | Illinois | Minnesota | Missouri | Texas | Wisconsin

Milwaukee, located in the Southeast portion of Wisconsin is a major league city—the business, cultural, sports and technical base of a four-county metropolitan market of 1.5 million people, making it the nation's 39th largest metro area. Milwaukee's many neighborhoods have much charm, and its beautiful parks are world-famous. Its lakefront downtown is busy, noted for its Old-World charm and modern buildings. With the recent opening of the Fiserv Forum Arena, its downtown is undergoing an urban renaissance. It is an affordable, comfortable place to live, do business and raise a family, big enough to be exciting and uncongested enough to get around in easily. It is safe, friendly and clean. It offers great restaurants, art galleries, museums, theatre, music and all of the pleasures of city life.

For more information on what Milwaukee has to offer, please visit: <http://www.visitmilwaukee.org/>



Spano Pratt Executive Search shall provide equal opportunity to all qualified candidates, and will refer candidates without regard to race, color, religion, national origin, sex, age, disability, veteran status or any other legally protected basis.