

## Role Description

Title: Finance Associate  
Responsible to: Vice President of Finance  
Revised Date: January 2016

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All the criteria-based duties and standards within this document will be performed according to established policies, procedures, and guidelines within PPUW.

## Role Summary

Role Title: Finance Associate

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### Essential duties/responsibilities:

- Enter pledge and payment transactions in Andar database.
- Input account data according to standards ensuring accuracy, proofing information, and correcting errors as needed to ensure valid and accurate reporting.
- Assist in keeping donor database accurate by reviewing and updating data as necessary.
- Assist with donor communications: Thank You Letters, Tax Receipts, and Billing Statements.
- Scan and attach files into Andar database.

### Experience Required:

- Motivated self starter with strong analytical ability.
- Must have strong attention to detail.
- Able to work in a fast paced environment under minimal supervision.
- Excellent verbal and written communication skills.
- Demonstrated proficiency in Microsoft Excel and Word.
- **Other duties/responsibilities:** Serve as backup to other Finance positions as needed.
- Willing to work with volunteers.
- Supports PPUW Goals.
- Other duties as assigned.

### Education Requirements:

- Associates degree in Accounting, Business or Finance. Bachelors Degree preferred.

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1. **EDUCATION.** The ideal incumbent will have a Bachelor's Degree in business, public administration, communications or related field.
2. **EXPERIENCE.** The ideal incumbent offers a minimum of 5 years experience, with specific experience in a non-profit organization preferred. In addition, advanced knowledge of computer technology, including office software packages is required.
3. **ESSENTIAL TECHNICAL/MOTOR SKILLS:** The ideal incumbent will possess a set of skills including, but not limited to leadership, conflict resolution, leadership selection, change management, process improvement, innovation and financial acumen.
4. **INTERPERSONAL SKILLS:** The ideal incumbent demonstrates the following competencies:
  - **Character:** This leader follows the standards of behavior; displays honesty and integrity in every action and decision; is driven to achieve; is reflective and seeks authentic feedback; and is known as a continuous learner.
  - **Team Skills:** This leader is a good listener; includes and engages others; is an effective facilitator; brings the "right" stakeholders into decisions and actions; and resolves conflicts respectfully.
  - **Functional Skills:** This leader follows organizational policies and standards; has effective technology skills; demonstrates effective business acumen; is mindful and effectively leverages resources; has a key metrics focus in decisions; and is astute about how to improve outcomes.
  - **Interpersonal Skills:** This leader has effective verbal and written skills; practices a consultative approach, develops and mentors staff; is willing and able to have crucial performance conversations; and influences and inspires others.
  - **Leading Change:** This leader aligns his or her work to the strategies of PPUW; understands external trends and prepares the organization accordingly; is seen as a change champion; is innovative; and is seen as a thought leader in his or her respective functional scope of work.
5. **ESSENTIAL PHYSICAL REQUIREMENTS:** Moving, walking, balancing, kneeling, crouching, stooping, reaching, standing, pushing, pulling, and lifting.
6. **ESSENTIAL MENTAL ABILITIES:** The incumbent will possess a set of skills including, but not limited to forecasting, analyzing, synthesizing, explaining, adapting, comprehending, interpreting data, organizational skills, speaking in front of groups, conflict resolution, listening skills, and the flexibility to meet the changing needs of the organization.

7. **ESSENTIAL SENSORY REQUIREMENTS:** Visual and hearing skills.
8. **EXPOSURE TO HAZARDS:** Limited exposure.

To Apply: Please email your cover letter and resume to [hr@ppunitedway.org](mailto:hr@ppunitedway.org)