



CHIEF FINANCIAL OFFICER IDEAL CANDIDATE PROFILE

Via of the Lehigh Valley, a non-profit agency located in Bethlehem, Pennsylvania, provides services for children and adults with disabilities like autism, cerebral palsy and Down syndrome. At this time, the organization is recruiting its next Chief Financial Officer (CFO). The ideal candidate will be a dynamic, business savvy professional who is passionate about ensuring the future of the organization.



VIA OF THE LEHIGH VALLEY

Via envisions a time when all people will have equal access to appropriate developmental and educational services; have friends who care and relationships that are rich and meaningful; a rewarding career of their choice; and a satisfying retirement.



Via provides children, adults and their families with quality services that facilitate developmental and educational opportunities, as well as personal choice of career, home, leisure and retirement. Via focuses on a person's abilities and provides support needed for success. Employing someone from Via means more than workforce diversification - the partnerships Via establishes in the business community are having a positive impact on the way the public perceives people with disabilities.

With a staff of 150 and an annual operating budget of \$10 million, Via's programs serve more than 1,250 people annually.

Via operates under the following guiding principles:

- People should be treated with dignity, respect, fairness and consideration in environments that are safe, comfortable and support individual advancement.
- Personal growth is encouraged by supporting each other's talents and potential.
- Common goals are achieved when we work cooperatively by combining our individual strengths and skills.
- Developing inclusive community support and resources enhances the quality of life.

- An atmosphere of mutual respect for each other's differences adds quality to our services.
- When we listen to each other and share ideas, we use our collective experience and backgrounds to problem-solve and innovate.
- Everyone is responsible for bringing about the change necessary to benefit those we serve to the fullest extent.

PROGRAMS AND SERVICES

Via provides services for individuals from pre-school through adulthood and serves businesses by providing solutions to essential staffing needs.

Children's Services

- [Early Intervention](#)
Essential treatment therapies such as speech, physical, occupational and adaptive behavior therapy.
- [Lehigh Children's Academy](#)
High quality, nurturing care and education for young children and before and after-school care for school age children.



Employment Services

- [Community Employment](#)
Via provides job development, job coaching and follow-along support to adults with disabilities so they can work in the community.
- [School-to-Work Transition Services](#)
Via works with one-to-one with students in partnership with school districts to create a personalized plan for young adults preparing for the next step after high school – employment.
- [Small Group Employment](#)
Via Transitional Employment teams work onsite at local companies and provide contract services for Lehigh Valley employers.
- [Via Business Services](#)
Specializing in contract packaging and assembly work, Via provides consistent high-quality work for businesses including specialty and promotional packaging, display assembly, and small parts assembly.

Community Connections

- **Community Mentoring**

Helps individuals discover preferences to choose appropriate recreational activities.

Adult Training Services

- **Creative Expressions provided by Via Adult Training Services at the John E. Walson Center**

Promotes wellness and social interaction by introducing adults to cultural and recreational activities.

Employment Services – Quality Staffing Solutions



Via is a leader in employment training and placement and has helped thousands of people with disabilities gain meaningful employment in our community. Via's staff work closely with businesses to match job seekers who will enhance your company's productivity, efficiency and profitability. Via's support continues as long as needed, and typically becomes less or unnecessary as the employee becomes acclimated to the work situation and responsibilities and develops natural a natural support system among co-workers and peers.

THE ROLE OF THE CHIEF FINANCIAL OFFICER

The CFO has oversight responsibility and is accountable to the CEO, for Via's overall financial management, analysis, reporting, and other strategic responsibilities for the Via Companies (Via of the Lehigh Valley, Inc., Via Events, Inc. and Via Foundation, Inc.). A position with internal and external responsibilities, the CFO interacts with government administrators, funders and peer organizations. The position also supports the Board Finance Committee in carrying out their oversight responsibilities. The CFO is a member of the Leadership Team which includes the CEO, and Vice Presidents of Services, Development & Communication, and Human Resources.

Direct Reports

- Director of Finance & Accounting
- Maintenance Director
- IT consultant

Indirect Reports

- Accounts Payable
- Accounts Receivable
- Payroll

Fiscal Oversight

- Manage day-to-day financial functions to ensure accurate and timely reporting; efficient operations; appropriate use of resources; a healthy internal control environment and good communication.
 - Manage the administration of internal financial policies, procedures, and necessary controls.
 - Oversee detailed monthly financial reports for Via Companies (including reconciling, reviewing and preparing entries).
 - Oversee general ledger coding and invoices for account payables.
 - Monitor and help control revenues and expenses.
 - Review and approve all employee expense reports, invoices and payment requests.
 - Manage cash flow and financing arrangements.
- Oversee and direct the financial and accounting activities involved in budget planning, preparation, and analysis.
 - Work with the Vice Presidents, Directors/Managers and CEO to establish annual budgets and ensure programmatic activity adheres to the budget.
 - Oversee monthly variance analysis on corporate and department levels comparing actual vs. budget and month to date vs. year to date.
 - As needed, complete monthly forecast and re-budgets.
- Oversee and direct the financial and accounting activities involved in grant management; contract preparation and compliance; purchasing; and risk management activities.
 - Work with State, Counties and all other Via funders concerning contracts, billing, rates cost reports and budgets.
 - Review and maintain corporate contracts for administration, service and facility maintenance/development.
 - Oversee corporations purchasing systems to obtain best value, and quality goods and services.
 - Manage leasing arrangements and sale of Via real estate.
 - Continue to enhance the ongoing disaster recovery plan.
- Oversee annual audit process and financial control environment, liaise with other external parties e.g., tax advisors, payroll bureaus, and banks to ensure all information is obtained and analysis is prepared in a timely manner.
- Coordinate business plans, forecasting, and budget management to support attainment of company's growth objectives.
 - Aid in the development and implementation of the strategic and implementation plans.
 - Work closely with CEO and Leadership Team on special projects and visions for the future.
 - Supervise expansion projects.

- Aid in the ongoing development of fundraising.
- Oversee Via's insurance policies and liabilities.
 - Evaluate and review all insurance proposals for cost effectiveness and efficiencies.
 - Oversee processing for insurance claims for auto, property and general liability.
- Act as liaison between Via and external constituencies such as financial institutions, investment firms, retirement plan consultants, auditors, and others.
 - Oversee Via's 403(b) Retirement Plan assets, related vendor relationships, and other activities.
- Recommend, monitor and supervise systems for finance, accounting and information systems; make recommendation for future efficiencies and supervise implementation of new initiatives.
- Ensure compliance with federal, state, local, and organizational laws, regulations, guidelines, and best practices, including but not limited to tax laws, generally accepted accounting principles (GAAP), federal acquisition regulations (FAR), and cost accounting standards (CAS), ensuring that the board and corporate officers and staff are fully familiar and taking the necessary actions to maintain compliance.
 - With the team, prepare and coordinate the tax filings, statements, quarterly supplemental package, etc.
- Contribute and assist with board materials and reports. Present monthly reports to Boards, Committees, Leadership and Management Teams, and Directors, soliciting input from staff to be shared with these groups. Serve on Via Committees as financial advisor.
- Participate in stakeholder committees including but not limited to Rehabilitation & Community Providers Association (RCPA), Hearten Workers' Compensation, and Rehabilitation and Community Providers Services Organization, Inc. (RCPSO).

Information Technology (IT)

- In conjunction with IT contractor, manage all IT procurement and projects.
- Continue to enhance the ongoing disaster recovery plan.

Facilities Management

- Oversee the overall management and maintenance of all buildings, grounds, vehicles and equipment owned or leased by the agency.
 - Oversee the development of specifications for work needed, and evaluation of outside contractors through a competitive bidding process.
 - Oversee management of inventory of supplies and materials.

- Oversee preventive maintenance schedules, carpet cleaning schedules, painting schedules, and fire extinguisher inspections for all facilities.
- Oversee expansion and building projects.

General

- Teach and exhibit professional behavior and promote a positive work environment through the supervision of staff.
- As required by the PA Office of Development Programs, complete required annual training of 12 hours per year.
- Conduct performance evaluations for employees who directly report to this position.
- Perform such other job-related duties and special projects as may be assigned.

The above responsibilities represent the major tasks assigned to incumbents on this job title. They are not intended to be an exhaustive list of all tasks. On occasion, incumbents may perform other related tasks.

The CFO position requires work in a typical office environment. Standing, sitting, walking and typing required daily. Light travel is required.

IDEAL CANDIDATE QUALIFICATIONS AND COMPETENCIES

Via of the Lehigh Valley seeks a dynamic, business savvy CFO who to join its team. The ideal candidate will bring the following qualifications to the organization:

- Bachelor of Science degree in accounting or related field is required. MBA, CPA, or equivalent education/experience is preferred.
- Experience as a Chief Financial Officer, Vice President of Finance, or comparable senior manager. Nonprofit and/or healthcare experience a plus.
- Excellent communication (written, oral, & listening) skills.
- Ability to balance business needs and consider the mission-driven nature of a nonprofit human services provider.
- Experience with nonprofit accounting, finance, and tax matters.
- Experience with government funding and compliance issues.
- Ability to direct the efforts of others, build teams, provide constructive feedback, and lead employees to the successful completion of assigned tasks.
- Exceptional analytical ability including the capacity to compile and organize data, make decisions, and recommend and implement strategies.
- Ability to work effectively with a variety of audiences, including public sector funders, employees, the board of directors, senior staff, and the CEO.
- Ability to handle multiple projects and tasks, set priorities, meet deadlines, adjust quickly to changing priorities.

- Strong interpersonal and collaborative skills with creative problem-solving ability.
- Advanced computer software application skills for accounting (preferably Sage and MAS90), Excel and Word.

Via of the Lehigh Valley is committed to maintaining an inclusive workforce, where employees are hired, retained, compensated, and promoted based on their contributions to our mission, free from discrimination, prejudice and bias. We are committed to diversity, equity and inclusion throughout our organization. Candidates are considered for employment without regard to race, ethnicity, color, religion, gender identity or expression, sex, sexual orientation, national origin or ancestry, genetic information, age, disability, marital or familial status, veteran or military status, or any other status protected by applicable law.

COMPENSATION

Via of the Lehigh Valley is prepared to offer a competitive salary and benefit package to the candidate selected to be their new CFO. In addition, the CFO position at Via of the Lehigh Valley offers an opportunity to join a dedicated team of professionals that is making a profound difference in the community and in the lives of the individuals who enjoy greater independence and are able to participate more fully in society because of the organization's work.

CONTACT INFORMATION FOR INTERESTED CANDIDATES AND NOMINATIONS

If you would like to express your interest in this position, please send a cover letter and resume to Jim McGuirk, Managing Director, Northeast Regional Office at jim@dcm-associates.com. If you would like to discuss the opportunity further or would like to recommend a candidate, please contact Dennis C. Miller, Founder & Chairman at dennis@dcm-associates.com.



*Executive Search
Nonprofit Leadership
& Board Performance*

February 11, 2022