



# SOCIETY<sup>to</sup> IMPROVE DIAGNOSIS in MEDICINE

## **Job Description Finance Manager**

**Title: Finance Manager**

Supervised by: Chief of Staff & CFO

Status: Fulltime, Exempt

Date: September 2019

**Location: Work from home**

### **Our Organization**

The Society to Improve Diagnosis in Medicine (SIDM) catalyzes and leads change to improve diagnosis and eliminate harm, in partnership with patients, their families, the healthcare community, and every interested stakeholder. <http://www.improvediagnosis.org> SIDM leads the Coalition to Improve Diagnosis in Medicine and is funded for a multi-year outreach and engagement campaign to raise awareness of the issue of diagnostic error.

### **The Position**

The Finance Manager will work with and report directly to the Chief of Staff & CFO. This exempt position is responsible for providing financial support and is primarily responsible for accounting for grant and sub-grants agreements including invoicing, awarding, collecting, payment processing and related grant financial reporting. Other responsibilities include budgeting, general ledger and sub accounts maintenance, invoice processing, journal entries for monthly closing as well as variance analysis, payroll support, bank and account reconciliations, financial report preparations and monitoring company internal controls and other special projects as assigned. Strong organizational, problem-solving and time management skills are required. High degree of accuracy and attention to detail is needed.

### **Grants and Sub-Grants/Contracts (50%)**

- Reconcile budget to actuals for all grants, maintain accounts receivable, grants payable accounts and review and analyze P&L reports for all grants and sub grants monthly.
- Maintain grant and sub-grants information.
- Assist in the process of applying for grants/contract proposals by supporting budget development.
- Coordinate the follow-through on deadlines and financial reporting requirements over the life of each grant or contract.
- Assist in creating contracts, sub-contracts, sub-awards, sub-grants and grant agreements.
- Review and approve annual financial reports from grantees in accordance with their approved grant agreements.
- Assist the Chief of Staff & CFO in preparing financial compliance reports for funders.
- Monitor and distribute expenditures in accordance with approved grant agreements.
- Assist the Chief of Staff & CFO in preparing budget modification and no cost extension requests.
- Perform other tasks as may be required from time to time.

### **GL and Others (50%)**

- Assist in preparing journal entries and collecting, analyzing and summarizing account information for monthly and year-end closing.
- Analyze and reconcile specific general ledger account balance sheets and P&L accounts.
- Reconcile bank accounts including investment accounts.
- Perform special and specific financial and statistical analysis as requested.
- Maintain the fixed asset and associated depreciation schedules; prepare monthly detail general journal entries; ensure proper recording of new purchases and disposals.
- Maintain accounts receivable and payable balances and ensure all items are accounted for and accounts are current.
- Coordinate with team members to ensure invoice payment, revenue collection and proper GL coding of all transactions.
- Reconcile accounting records and donor software records to confirm the accuracy of both.
- Act as lead and collaborate closely with project leads and other team members in the approval and payment of invoices and proper coding of expenses to the GL and budget line items.
- Perform other tasks as may be required from time to time.

### **Skills/Qualifications/Experience**

- Minimum of 3 years related experience
- Bachelor's degree in Accounting or equivalent with at least three years accounting experience
- Solid understanding of GAAP and grant accounting processes
- Advanced experience using Excel and other products in Microsoft Office suite
- Must be highly organized with exceptional attention to detail and accuracy
- Ability to work effectively under pressure, with excellent skills in initiating solutions
- Exceptional ability to work collaboratively and provide customer service with internal staff and external partners
- Non-profit experience and previous experience with QuickBooks Online software highly desired
- Experience with Neon or other CRM software preferred

### **Responsibilities**

- Develop annual budget.
- Create monthly cash flow projections.
- Prepare balance sheet reconciliations.
- Prepare weekly cash flow reports.
- Prepare and post journal entries.
- Coordinate invoice payment and revenue collection.
- Maintain fixed asset inventory.
- Generate monthly financial statements, budget to actual results and analysis.
- Assist in developing grant application budgets.
- Maintain grant financial records and generate monthly budget tracking.
- Assist independent auditors during annual audit.
- Assess the financial implications of strategic plans
- Monitor the financial results of new activities and projects

### **Qualifications**

- Working knowledge of GAAP.
- Knowledge of accounting practices relevant to non-profit accounting.

- Current on Quickbooks Online accounting software, Neon, and Microsoft Office.

### **Education and Experience Requirements**

- At least three (3) years accounting experience.
- Payroll processing experience.
- Bachelor's degree in accounting preferred.
- Prior work experience in a non-profit environment preferred.

### **Work Environment**

- Chicago-area (preferred). Virtual office at this time, change to flexible in- and virtual office days in the future. Occasional work on evenings and weekends as needed
- This position requires availability during business hours, Monday through Friday
- Smoke- and drug-free environment
- Some work at off-site locations may be required and those may not necessarily be fully accessible
- This role routinely uses standard office equipment such as computers, phones, photocopiers, scanners, filing cabinets, and fax machines. Employee is regularly required to talk, hear, stand, walk, use hands to finger, handle or feel; and reach with hands and arms
- SIDM is an equal opportunity employer and seeks to employ qualified individuals based on individual merit. SIDM does not discriminate against any individual with respect to the terms and conditions of employment based on that individual's race, sex, age, religion, color, national origin, disability, genetic information, marital status, veteran status, sexual orientation, gender identity or expression, housing status, or any other non-merit factor protected under state, local or federal laws. Equal Employment Opportunity applies to all personnel actions such as recruiting, hiring, compensation, benefits, promotions, training, transfer, termination, and opportunities for training. SIDM is committed to a fair and equitable workplace where everyone is a respected and valued member of the team

### **What Makes SIDM a Great Place to Work?**

- We offer a compensation package that includes SIDM sponsored health and dental insurance. We have generous leave and a flexible work schedule.

### **How to Apply**

- Please submit resume and cover letter and resume to [info@improvediagnosis.org](mailto:info@improvediagnosis.org) with the subject line "FM - your last name, first name." Indicate in your email where you heard of the position opening.
- No phone calls please.