



COOPERATIVE DEVELOPMENT INSTITUTE

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Finance Director	
Hours: 30 hours/week	Reports to: Executive Director
Wage: \$55,770 annual salary (exempt)	All-Remote work

Finance Director

Reports To: This position is supervised by the Executive Director and works in partnership with other CDI staff.

Salary and Hours: Salaried position, salary \$55,770 or commensurate with experience, for part-time work (30 hours/week). Paid time off: 3 weeks vacation, increasing to 4 weeks after two years' tenure, 6 paid personal days and 8 paid holidays/year (vacation, personal and holiday time based on 40 hours/week, prorated for part time). Access to health benefits, including dental and vision insurance, 403b retirement plan and \$100/month wellness benefit. A largely remote-based position with a \$225/month office stipend, periodic home office equipment bonuses, expense reimbursement and mileage reimbursement at the IRS rate.

Geographic Requirements: U.S.-based only. Occasional travel to the Northeast may be required, about twice a year.

About The Cooperative Development Institute (CDI):

The Cooperative Development Institute (CDI, www.cdi.coop) is the Northeast's Center for cooperative business education, training, and technical assistance. CDI was founded in 1994 by cooperative leaders across industry sectors with a mission to build a cooperative economy in the Northeast through the creation and development of successful cooperative enterprises and networks in diverse communities in New York and New England.

Our mission is to work with people in the Northeast to create cooperative businesses and networks that grow a prosperous, equitable economy. Our vision is transforming ownership of our economy, so all people can meet their basic needs!

CDI is a virtually based 501(c)3 non-profit with 28 employees and an annual budget of just under 3 million dollars.

THE SOURCE FOR COOPERATIVE BUSINESS DEVELOPMENT IN NEW ENGLAND & NEW YORK

In accordance with Federal law and U.S. Department of Agriculture policy, this institution is prohibited from discrimination on the base of race, color, national origin, sex, age, or disability. (Not all prohibited bases apply to all programs.) To file a complaint of discrimination write USDA, Director, Office of Civil Rights, 1400 Independence Avenue SW, Washington, DC 20250-9410, or call (800) 795-3272 (voice) or (202) 720-6382 (voice and TDD).

CDI works to support, advise and provide technical assistance to many forms of cooperatives in the Northeast. CDI's Northeast Resident Owned Communities (NEROC) program provides support and assistance for residents of manufactured home communities to purchase their parks and run them cooperatively. Our Business Ownership Solutions (BOS) program focuses on conversion of existing businesses to worker ownership and our Cooperative Food Systems (CFS) program works with all food-related cooperatives; from assisting New American and Native American farmers to rural food cooperative retail stores and producer co-ops. And that's not all of what we do!

Job Overview:

The Finance Director participates in the leadership of the organization and aligns fiscal planning, budgeting, and ongoing management with organizational strategic goals. This is a typical nonprofit Finance Director role with some creative additions. The organization seeks a candidate with enthusiasm for participatory budgeting process, democratic management principles, socially responsible investing, and occasional training of novice colleagues and/or program clients on financial topics. As CDI continues to work towards racial justice and collective liberation externally & internally, the organization seeks a Finance Director who has demonstrated ability to bring a racial equity lens to their specific work in finance as well as general Director-level organizational aspects.

The position is virtual and hours can mostly be worked at employee's preference; around meeting schedules, and times of development of annual budget, quarterly reports and annual audits.

The position oversees the work of the Bookkeeper, but has no direct reports. Payroll, audit, and tax filing services are provided by third party contractors and overseen by the Finance Director.

Essential Job Functions:

1. Serve as finance director for the organization, participating in the Management Team, and responsible for accounting tasks, reporting, and guidance in alignment with organizational goals and staffing.
2. Assist the Board Treasurer, Finance Committee, and general Board members to develop a critical understanding of the organization's budget, projections, status and performance through regular reporting and meeting participation.
3. Assist organizational leadership (the "Cabinet", a decision-making body made of department heads and representatives) to develop a critical understanding of the organization's budget, projections, status and performance through regular communication, reporting and meeting participation.
4. Oversee bookkeeping functions; monthly reconciliation, verification of entry and allocation and details of business transactions to accounts in journal entries using QuickBooks. Business transactions include grant contracts, invoices, receipts, bills, timesheets, reimbursable expenses, bank and G/L reconciliations, loan agreements, subcontractor contracts, and other miscellaneous forms of payables and receivables.
5. Prepare federal and foundation grant proposal budgets, and subsequent reports and invoices in conjunction with program staff and the Development Team.
6. Manage cash between interest-bearing accounts.
7. Assist the Executive Director in the organization's annual participatory budgeting process, quarterly revisions of projections, and consideration of social investment opportunities for surplus funds, or supports for short-term cash flow needs. Work with program leads throughout the year to manage budgets and planning.
8. Oversee bookkeeping relative to Fiscal Sponsorships and provide advice on appropriateness relative to 501(c)3 requirements of fiscal sponsor budgets.
9. Assist, as needed, with the development, implementation, and enforcement of financial systems, policies and procedures to ensure complete and accurate financial accounting, strong financial controls and organizational efficiency, effectiveness and stability.

10. Assist bookkeeper, as needed, to provide supporting documentation to CDI's auditor/CPA for all end-of-the-year reports and tax filings, including annual financial audit. Apply General Journal Entries supplied by auditor/CPA following the annual audit.

Minimum Requirements

1. Experience equivalent to a Bachelor's Degree with non-profit accounting.
2. Minimum of five years' experience in financial management including experience in accounting system design, analysis, and implementation. Strong knowledge of non-profit fiscal management, general business practices and GAAP.
3. Computer literacy, including strong knowledge of Microsoft Excel and QuickBooks Desktop.
4. Familiarity with accounting software, budgeting software and Google Apps.
5. Excellent communication and interpersonal skills.
6. Enthusiasm for cooperative economics and participatory management principles; dedication to economic justice.

Knowledge Skills/Abilities

- Enthusiasm for communicating with novice colleagues and clients on financial topics/skills.
- Ability to think critically and solve problems and work well under pressure with critical deadlines.
- Strong interpersonal skills.
- Knowledge of cooperatives and cooperative accounting, a plus!
- Familiarity with socially responsible/justice oriented financial management frameworks a plus.
- Experience with Federal, State and Foundation grant reporting a plus.
- Experience with Strategic Planning processes of comparable nonprofits or small businesses a plus.
- Experience with managing Fiscal Sponsorship activities and program design a plus.

Inclusion

In accordance with Federal law, this institution is prohibited from discrimination on the basis of race, color, national origin, sex, age, or disability. CDI is an equal opportunity employer and service provider.

We promote economic prosperity for all through our work with our clients, our hiring practices, and our vigorous commitment to cooperative principles. We strive daily to acknowledge and eliminate all forms of oppression. By examining bias within ourselves and our organization, we work mindfully to make our board and staff more inclusive. We actively fight against racism, classism, gender inequality and all efforts to marginalize anyone. The nature of our work engages us directly with the working poor, the educationally disadvantaged, the elderly, immigrants and refugees. It is our goal to see all of our clients prosper within the cooperative movement.

We welcome applicants from underrepresented identities, and those who have a commitment and track record of bringing an inclusive and equitable approach to their work. People of color and women, queer, trans, or non-binary people and those with disabilities are encouraged to apply. CDI is an equal opportunity employer and provider.

Instructions

Please submit answers to our questionnaire, a resume, and three references via webform at <https://cdi.coop/job-opening-finance-director/>. The deadline for applications is **March 15, 2021**.