



EXTERNAL POSTING
Employment Application Packet
for
Chief Financial Officer
Position

Pay Level: \$2879.20 Bi-Weekly
Hours: 40+ hours per week
Work site location: Westby Office

The job description is attached.

For your application to be considered, you must complete all of the following materials that have a check mark before them:

√ Application form

√ Ranking Criteria form

√ Resume

This application packet is due by 2:00 PM on Monday March 19, 2018.

We will only consider your application if we have received the materials by the specified due date and time.

Materials may be emailed to becky.solberg@couleecap.org, faxed to 608-634-3134, or mailed or dropped off at: Couleecap, 201 Melby Street, Westby, WI 54667

If faxing, please call Becky Solberg at 608-424-5285 to make sure all pages are received.

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A message from our Executive Director, Hetti Brown

Thank you for your interest in a position at Couleecap. Couleecap is a non-profit organization that has been serving the community for over 50 years. The key to our success is the staff of over 50 local residents who are dedicated to helping others. For many employees, this work is more than a job. It is a career, a life's work, a way of being part of the great Couleecap mission of *people helping people*. We believe that your contribution to fulfilling this mission will add great value to your life.

We are an anti-poverty organization. We fight the conditions of poverty throughout our communities. We work to help individuals and families improve their quality of life while advocating for solutions to the root causes of economic inequality. We want to hire people who share our commitment to these goals.

Couleecap is an inclusive workplace where diverse experiences, employee input, and teamwork are encouraged and supported. We offer a broad range of excellent pay and benefits and opportunities for personal and professional advancement. We want every individual to learn and grow while working at the agency. Beyond this, employees benefit from the feeling of personal satisfaction gained while helping others change their lives for the better.

Our organization has a dedicated and supportive Board of Directors. The Couleecap Board encourages the staff to be the best that they can be, and their support has enabled Couleecap employees to focus on providing outstanding service to our communities since 1966. If you are a dedicated employee who wants to help us accomplish our important work, we need you as much as you need us.

Thank you,

Hetti Brown



PLEASE NOTE: You must answer in writing the ranking criteria listed below. Attach your answers to your application or your application will be rejected.

Ranking Criteria Form for position: Chief Financial Officer

**** PLEASE READ THIS:** All applications for employment at Couleecap are rated according to certain criteria. Applications for this position will be ranked on the criteria listed below. Be sure to address each of these criteria on an additional page(s) that you attach and return. You will be rated and given points based on these criteria. Applicants with the most points will receive an interview. All applicants will be notified (usually by mail) if they have been selected for an interview or not.

1. What interests you about this position?
2. What finance management related training or experience do you have? Indicate if your experience is in the nonprofit, public, or private sector.
3. Describe your experience developing and administering annual budgets and budget reports.
4. Describe any experience you have in implementing or utilizing finance software programs.
5. Describe your experience managing payroll, invoice and payment procedures and voucher management processes.
6. Describe your experience in preparing for audits and implementing or evaluating audit recommendations.
7. Describe your experience working with a Board of Directors.
8. Describe your supervisory experience.
9. Describe your experience researching/interpreting regulations, manuals, and contracts.
10. Your application materials will be evaluated for written communication skills. Describe your oral communication skills.

Couleecap is dedicated to the philosophy of Continuous Improvement. This means that we are committed to teamwork, the use of good conflict resolution skills, and good communication skills. We encourage employee input and group problem solving. We want every individual to learn and grow while working at the agency. We want to hire people who share our commitment to these ideas and goals.

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COULEECAP
Job Description: Chief Financial Officer

SALARY LEVEL: Grade 37

DATE: January 2018

SUMMARY: Chief financial agent for the agency, supervising agency accounting and clerical support functions, including accounts receivable and payable, payroll, general ledger entries, and internal and external financial reporting. Also is responsible for audit and risk management recommendations and oversight; financial and operational strategy; metrics and reporting; and ongoing development and control systems designed to preserve organization assets. The employee is expected to exercise initiative, discretion, and independent judgment in accomplishing assigned duties. Employee is a key member of the agency management and leadership. Serves on agency Management Team and contributes to overall agency management and strategies.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

Supports and upholds Couleecap's mission to fight poverty and promote self-sufficiency for individuals by helping to identify needs, mobilize resources, and provide quality services.

Directs finance activities and staff. Supervises cash management activities.

Oversees financing of agency assets. Supervises production of annual budget and budgeting processes.

Manages all fiscal information systems.

Maintains appropriate insurance coverage; researches changes in benefits.

Acts as "internal auditor" for agency fiscal affairs and program management. Develops performance measures that support the organization strategic plan.

Maintains control over all invoice documentation and payment procedures. Approves vouchers for payment. Monitors agency expenditures to ensure conformity with rules, laws, & restrictions.

Provides technical assistance to Management Team, including annual and quarterly budgeting, research and recommendations on contract compliance issues and financial reporting.

Trains program staff on agency finances.

Provides concise, uniform monthly reporting on all agency financial activities and other items, as requested to staff and Board. Gathers information and prepares financial reports.

Prepares for audits; attends entrance, ongoing and exit interviews; implements and evaluates appropriate audit recommendations.

Develops tax strategies.

Develops capital plans and budgets at request of Executive Director.

Contributes to department improvement efforts.

Provides financial information and recommendations for housing development efforts; monitors expenditures for construction and operation.

Provides staff support to the Board Administration Committee.

SUPERVISORY RESPONSIBILITIES: Supervises 1 subordinate supervisor for a total of 1-3 employees in the Administration Department. Carries out supervisory responsibilities in accordance with the agency's policies and applicable laws. Responsibilities include interviewing, recommending hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

QUALIFICATION REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE: Requires completion of a baccalaureate degree in a college or university or four to seven years' previous experience; or equivalent combination of education and experience. Thorough knowledge of Microsoft Excel and experience with computerized accounting systems preferred.

LANGUAGE SKILLS: Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, financial reports, legal documents, and governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, & the general public. Ability to respond to inquiries or complaints from customers, regulatory agencies, or members of the funding community.

MATHEMATICAL SKILLS: Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

REASONING ABILITY: Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form. Ability to define problems, collect data, establish facts, and draw valid conclusions.

CERTIFICATES, LICENSES, REGISTRATIONS: Access to dependable, licensed, insured driver and transportation.

OTHER SKILLS and ABILITIES: Thorough knowledge of fiscal risk and administrative management practices; good knowledge of funding source requirements and grants management. Strong professional judgment and ethical practice record. Ability to communicate effectively orally and in writing to individuals and groups.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel objects, tools, or controls; and talk or hear. The employee is occasionally required to stand, walk, and reach with hands and arms. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.



201 MELBY STREET • WESTBY, WISCONSIN 54667 • PHONE: 608-634-3104 • FAX: 608-634-3134 • WWW.COULEECAP.ORG

Application For Employment

COMPLETE ALL SECTIONS. WRITE IN "N/A" IF REQUESTED INFORMATION IS NOT APPLICABLE.

1. Name (Last, first, middle)			
2. Address			
Street or RFD #	City	State	Zip Code

3. Position desired
4. Telephone #
5. Email

ANSWER ITEMS 6 THROUGH 10 BY PLACING AN "X" IN PROPER COLUMN. PROVIDE DETAIL WHERE APPLICABLE.

	YES	NO
6. Do you have a legal right to work in the United States permanently?.....		
7. A. Do any members of your immediate family serve on the Couleecap, Inc. Board of Directors?.....		
B. Are any members of your immediate family currently employed by Couleecap, Inc.?.....		
Note: Immediate family is defined as spouse, parent, child, sibling, father-in-law, mother-in-law, brother-in-law, sister-in-law, grandparent, grandchild, aunt, uncle, niece, nephew, stepparent, stepchild, son-in-law and daughter-in-law.		
C. If 7A or 7B was answered "Yes", give name of family member.		
8. Have you been employed by Couleecap, Inc. before?.....		
If "Yes", give position(s) held and dates.		
9. A. Are you available for work immediately?.....		
If "No", on what date would you be available? _____		
B. Are you available to work full time?.....		
part time?.....		
temporary?.....		
10. A. Can you travel if the job requires it?.....		
B. Do you have dependable transportation?.....		
C. Do you hold a valid driver's license?.....		
D. Do you carry auto insurance coverage?.....		

11. EDUCATION	HIGH SCHOOL	TECHNICAL SCHOOL/COLLEGE	GRADUATE/PROF.
School Name & Address			
Years Completed			
Diploma/Degree			
Describe Course of Study			

Describe specialized training, skills, apprenticeships:

12. EXPERIENCE: BEGIN WITH CURRENT OR MOST RECENT JOB OR VOLUNTEER EXPERIENCE AND WORK BACK. ACCOUNT FOR PERIODS OF UNEMPLOYMENT EXCEEDING THREE MONTHS ON THE LAST LINE OF EXPERIENCE BLOCKS IN ORDER OF OCCURRENCE.

Name & Address of Employer: Telephone:	Dates of Employment (month & year) From _____ To _____	Reason for leaving
	Title of Position	Name of Immediate Supervisor
	Salary or Earnings Beginning \$ _____ per _____ Ending \$ _____ per _____	May We Contact this Employer? <input type="checkbox"/> Yes <input type="checkbox"/> No

Description of work (describe specific duties, responsibilities and accomplishments in job)

Name & Address of Employer: Telephone:	Dates of Employment (month & year) From _____ To _____	Reason for leaving
	Title of Position	Name of Immediate Supervisor
	Salary or Earnings Beginning \$ _____ per _____ Ending \$ _____ per _____	May We Contact this Employer? <input type="checkbox"/> Yes <input type="checkbox"/> No

Description of work (describe specific duties, responsibilities and accomplishments in job)

Name & Address of Employer: Telephone:	Dates of Employment (month & year) From _____ To _____	Reason for leaving
	Title of Position	Name of Immediate Supervisor
	Salary or Earnings Beginning \$ _____ per _____ Ending \$ _____ per _____	May We Contact this Employer? <input type="checkbox"/> Yes <input type="checkbox"/> No

Description of work (describe specific duties, responsibilities and accomplishments in job)

13. Other Professional References (not former employers or relatives)

Full Name	Present Business or Home Address	Telephone #	Business/Occupation

A FALSE, INCOMPLETE, OR DISHONEST ANSWER TO ANY QUESTION ON THIS APPLICATION WILL BE GROUNDS FOR RATING AN APPLICANT INELIGIBLE FOR EMPLOYMENT WITH THIS AGENCY, OR FOR DISMISSAL AFTER EMPLOYMENT. ALL STATEMENTS ON THIS APPLICATION ARE SUBJECT TO INVESTIGATION (EXCEPT WHERE NOTED IN #12 ABOVE). ALL INFORMATION WILL BE CONSIDERED IN DETERMINING AN APPLICANT'S ELIGIBILITY FOR EMPLOYMENT WITH THIS AGENCY. I RELEASE COULEECAP, INC., FROM ALL CLAIMS AND LIABILITIES REGARDING REFERENCES GIVEN. I UNDERSTAND ALSO, THAT IF HIRED, I WILL BE REQUIRED TO ABIDE BY ALL RULES AND REGULATIONS OF THE ORGANIZATION. I UNDERSTAND THAT MY EMPLOYMENT WOULD BE FOR NO SPECIFIC PERIOD OF TIME AND THAT I MAY BE TERMINATED AT ANY TIME.

Signature of Applicant

Date

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Benefits For Full Time Employees

(Employees who average 60 or more hours per pay period)

Paid Time Off

Fixed Holidays: 10 days/yr. These paid holidays will be granted each year – New Year’s Day, President’s Day, Spring Holiday, (Good Friday) Memorial Day, Independence Day, Labor Day, Thanksgiving, day after Thanksgiving, Winter Break (December 24 & 25). Full time employees earn 8 hours of holiday pay for each fixed holiday.

Personal Holidays: Maximum of 16 hrs/yr. Employees accrue 3 personal holiday hours as of Jan. 1 & subsequently earn one-half hour of personal holiday time per pay period. Days can be used before earned. Available hours are prorated for those who start with the agency after January 1st of each year.

Vacation: Accrued at the rate of 5% of paid hours up to the 80-hour base. After completion of five years, this increases to 7.5% of paid hours and after completion of ten years this increases to 10% of paid hours. (Based on 24 payrolls)

Sick Leave: Accrued at the rate of 5% of paid hours up to the 80-hour base. (Based on 24 payrolls)

Hazardous Weather Pay: In the event of extremely bad weather, an employee may use up to 16 hrs each year w/ pay.

Funeral Leave Pay: In the event of a death, after notifying the supervisor, an employee may take paid leave according to the following schedule: family member, as defined by the employee – 3 days; co-worker – 1 day.

Military Leave: Military leave will be granted pursuant to Federal and State laws. Couleecap will pay the difference between agency pay (where agency pay is greater) and military pay for up to 15 days of mandatory annual active duty per year.

Court Appearances: Employees who are subpoenaed for court appearances related to agency business or for jury duty will be given the necessary leave of absence with full pay less any fee paid for the service.

Family & Medical Leave: All employees who have worked for Couleecap for 12 months and have worked at least 1,000 hours during those 12 months will be granted Family & Medical Leave pursuant to Federal and State laws. Family & Medical Leave is unpaid leave however employees may use any accrued sick, vacation, or personal holiday time for pay during leave.

Insurance/HSA/Flexible Benefits/Retirement

Health Insurance: The insurance is effective the 1st of the month after the employee has been employed for 30 calendar days. Couleecap will pay 75% of the premiums for the employee’s tier (i.e. single, employee + spouse, employee +child(ren), family) of the insurance plan. Monthly employee health insurance costs are based upon age and the age of any of dependents for single, employee + spouse, employee +child(ren), and family. Monthly premiums are divided in half and deducted from the first two payrolls of each month.

Dental Insurance: Couleecap pays 75% of the monthly dental insurance premium cost. The calendar year deductible is \$25 per member, \$75 per family. Monthly employee dental insurance costs are: \$8.58 for single and \$24.62 for family. Monthly premiums are divided in half and deducted from the first two payrolls of each month.

Life Insurance: Term life insurance coverage, equal to an employee’s annual wage, is provided at no cost to the employee. Additional life insurance coverage is available at the employee’s cost.

Voluntary Insurance: The following voluntary insurance plan is available to the employee: Life insurance. The employee pays the full cost of the premiums for these plans.

HSA: Couleecap has elected to make a contribution to a health savings account (HSA) for all employees who are eligible for and enrolled in the agency health insurance plan. For 2018, this dollar amount is equal to \$2,340 for single coverage and \$4,680 for employee + spouse, employee + children, and family coverage. Contributions are made monthly rather than paying the full amount at the beginning of the year.

Flexible Benefit Plan: Employees may elect to have a portion of their paycheck put into an account (before taxes) to pay for health care or dependent care expenses.

Retirement/401K Plan: Employees may choose to contribute a percentage of their earnings to the retirement fund. Employees will be given an investment option enrollment sheet when they become eligible. After an employee has completed one calendar year of employment with at least 1000 paid hours, Couleecap will contribute a Board approved percentage of your earnings toward the retirement fund, beginning with the appropriate eligibility date. Current Board approved percentage rate for Couleecap's contribution is 9% for 2018. The Board sets this percentage annually. Employees are vested after 3 years.

Additional Benefits

Employee Assistance Program: All employees and their family members will have an Employee Assistance Program available to them to assist them with personal or emotional problems, which may affect job performance. The first five visits to the EAP will be of no charge to the employee.

Training: As budgets permit, the agency pays for time, transportation, food, lodging, and fees for employee training opportunities.

Career Development Plan: Employees, after successfully completing their orientation period of service, who are interested in furthering their educational training through an educational institution may be reimbursed for some of the cost of books and/or tuition fees once the course is successfully completed and can use up to 80 hours paid release time per year.

Dues for Civic Organizations: Employees will be reimbursed up to \$200 a year for dues in a recognized civic organization appropriate to the agency's mission.

Good Will Program: Supervisors of employees may access the Good Will Program in recognition of various events that may involve employees, such as the birth of a child, hospitalization, death of a parent, etc.

Homebuyer Benefit: During work hours, employees can utilize home ownership counseling provided by Couleecap staff, for one individual hour per year and up to one group session per year. The agency will pay for staff time and mileage. Couleecap is not responsible for the employee's financial decisions.

AFFIRMATIVE ACTION SURVEY

Couleecap, Inc. is an equal opportunity employer and strives to comply with all government regulations and affirmative action responsibilities. Applicants are considered for all positions and employees are treated during employment without regard to race, color, sex, national origin, age, marital or veteran status, sexual orientation, or disabling condition.

We are required to collect data requested on this questionnaire for record keeping and to document affirmative action efforts. While your reply will be most helpful to us in carrying out our administrative responsibilities, return of this form is entirely voluntary.

This questionnaire will be detached from your application upon receipt. This information will not be seen or used by people involved in screening or in the interviewing processes for applicants. This data will be kept in a confidential file separate from your job application.

Thank you for your cooperation!

I chose to NOT complete this form.

1. Position Applied for: _____ Date _____

2. How did you first find out about this job opening?

_____ Advertisement	_____ Friend/Relative
_____ Job Service	_____ Walk-in/Inquiry
_____ From an employee of Couleecap	_____ Internet
_____ I am an employee of Couleecap	_____ Other _____

3. Gender: _____ Male _____ Female

4. Age 40 or Older: _____ Yes _____ No

5. Race:

_____ African American or African	_____ American Indian or Alaska Native
_____ Asian	_____ Native Hawaiian or Other Pacific Islander
_____ White	_____ Other Race
_____ More than One Race	_____ Unknown

Ethnicity:

_____ Hispanic/Latino _____ Not Hispanic/Latino _____ Unknown

6. Disability or Handicap: _____ Yes _____ No
(Please DO NOT tell us the disability or handicap you have – just whether or not you have a disability or handicap or perceive yourself as having one)

7. Veteran: _____ Yes _____ No Vietnam Era Veteran: _____ Yes _____ No

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