



Connecting Students & Volunteers  
for Results that Count

## Job Description: Vice President of Finance

**About Heart Math Tutoring:** Heart Math Tutoring (“HMT” or “Heart”) is a nonprofit based in Charlotte, NC with a mission of ensuring all elementary students develop the strong foundation in math and enthusiasm for academics needed for long-term success. Founded in 2013, HMT is a rapidly growing organization that today supports 1,300+ students across 29 schools in Charlotte, NC, Charleston, SC and Winston-Salem, NC with a staff of 50 employees and an annual budget of \$3.3M. HMT gives young students successful experiences in math through 1:1 tutoring during the school day, delivered by supervised volunteers. To date, 97% of Heart students have shown growth on pre/post assessments that meets goals set by elementary math specialists at the University of North Carolina at Charlotte and Charlotte-Mecklenburg Schools, and 90% of teachers annually report that student confidence increases because of the program. Heart plans to expand into new markets in the next few years and diversify funding sources to continue deepening and scaling its support for students. Read more at [heartmathtutoring.org](http://heartmathtutoring.org).

**Position Summary:** The Vice President (VP) of Finance is responsible for leading Finance, Human Resources (HR), Information Technology (IT), and Facilities operations at Heart Math Tutoring. Reporting to the Chief Executive Officer (CEO), the VP of Finance is on HMT’s Leadership Team and manages a team of two, including a full-time Operations Manager and part-time Accountant. This position is based in Charlotte, NC with a mix of remote and in-person work in a fast-paced and dynamic organization.

### Job Responsibilities:

#### Financial Management:

- Prepare financial reports and projections for HMT’s Leadership Team, Finance Committee, Board, and external audiences such as funders.
- Coordinate HMT’s Board Finance Committee (meetings, agendas, recordkeeping) in collaboration with CEO, leveraging committee member expertise to support HMT.
- Lead the annual budgeting process, collaborating with CEO and department heads to identify needs and cost savings opportunities to support HMT’s mission. Prepare and present budget proposal drafts to Leadership Team, CEO, Finance Committee, and Board.
- Own HMT’s multi-year, multi-region financial model in partnership with CEO and Executive Director of National Partnerships.
- Lead HMT’s cash management strategy. Manage operating and reserve cash balances and oversee disbursement process.
- Manage relationships with finance vendors (including banks and insurance providers).
- Maintain finance policies and procedures, ensuring compliance with relevant regulatory bodies. Implement and maintain strong accounting controls.
- Track results vs. budget and work with department heads to ensure HMT’s expenses are within approved budgets.
- Lead part-time Accountant in financial record keeping, analyses, and process management.
- Oversee a timely monthly close process.
- Coordinate and oversee annual audit process, ensuring a “clean” unmodified opinion.
- Review contracts for all HMT vendors and partners in relation to compliance and budget items.

#### Human Resources Administration:

- Partner with legal counsel, organization management, and outside HR resources to ensure HMT's HR policies comply with all applicable regulations and laws and provide maximum benefit to employees and the organization.
- With Operations Manager, manage and optimize the employee-facing HR database (Paylocity) which houses processes including payroll, staff surveys, performance reviews, hiring, training modules, and other HR administration items.
- Provide employee-facing training and support related to HR policies, benefits, and processes.
- Oversee relationships with all HR vendors including payroll and benefit providers.

#### IT and Facilities:

- Manage and optimize HMT's relationship with outside IT services provider.
- Ensure all internal hardware and software systems are up-to-date and efficient. With Operations Manager, train staff on their secure and effective use.
- With Operations Manager, manage and coordinate HMT's facilities including the main office, offsite meeting spaces, storage facilities and other facilities as needed by the organization. Oversee relationships with facilities-related vendors.
- Lead Operations Manager in providing day-to-day office management and technology support.

#### Strategic Leadership:

- As a member of HMT's Leadership Team, play a key role in setting and leading the organization's culture and strategic direction.
- Build strong culture in the Finance & Operations team, developing staff and fostering collaboration.
- Work cross-functionally to support other HMT initiatives including volunteer recruitment and development.

#### Key Qualifications:

- Passion for HMT's mission with a strong belief that all students can learn and have potential to perform at or above grade level.
- 7+ years of professional experience in accounting and financial reporting with technical competence in U.S. GAAP standards.
- Knowledge or experience in government/nonprofit accounting is preferred.
- Proven experience in financial modeling and analysis.
- Evidence of continuous learning and the ability to independently acquire new knowledge and skills.
- Integrity and sound judgement; a commitment to operate with humility, diplomacy and discretion.
- Relationship management experience; must be able to build and maintain productive relationships with various constituents including staff, vendors, volunteers and the Board.
- Excellent written and verbal communication skills.
- Exceptional attention to detail and technical skills including with Microsoft Excel and Quickbooks.
- Bachelor's degree in accounting or a related discipline. CPA is preferred.
- Alignment with HMT's core values: student-centered, growth mindset, precision and reliability, gratitude, and civic engagement.

We are an equal opportunity employer committed to building an inclusive work environment and supporting racial equity. We offer competitive compensation and anticipate this position's starting salary to be commensurate with the candidate's experience. To apply, please submit a 1-page cover letter explaining your interest and a resume to [elizabeth@edsadvisory.com](mailto:elizabeth@edsadvisory.com).