



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 national 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. 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.

Founded in 2013, HMT is a rapidly growing organization that today supports 1,300+ students across 31 schools in Charlotte, NC, Charleston, SC and Winston-Salem, NC. Heart plans to expand into new markets in the next few years, securing additional funding sources to its current annual budget of \$3.3M and building a national presence. Read more at heartmathtutoring.org.

Position Summary: The Vice President (VP) of Finance is responsible for the financial and administrative operations of Heart Math Tutoring. The VP of Finance will be a broad-based financial leader capable of managing a variety of tasks in a fast-paced and dynamic organization. Reporting to the Chief Executive Officer (CEO), the VP of Finance will manage a team of two, including a full-time Operations Manager and part-time Bookkeeper. This position will be based in Charlotte, NC with a mix of remote and in-person work anticipated.

Job Responsibilities:

Financial Management and Reporting:

- Oversee a timely monthly close process.
- Prepare financial reports for leadership, volunteer Board and Committees, and external audiences such as funders.
- Coordinate and oversee annual audit process, ensuring a “clean” unmodified opinion.
- Own HMT’s multi-year, multi-region financial model in partnership with CEO.

Budget Preparation and Management:

- Lead the annual budget process, collaborating with CEO and department heads to identify needs and cost savings opportunities to support HMT’s mission.
- Prepare budget proposal drafts and, with CEO, present to the Board and Finance Committee.
- Track results and ensure HMT’s expenses are within approved budgets.

Compliance and Internal Controls:

- Maintain finance policies and procedures, ensuring compliance with relevant regulatory bodies.
- Implement and maintain strong accounting controls.

Board and Committee Relations:

- Manage HMT’s Board Finance Committee in collaboration with CEO.
- Provide and present financial reports and other materials for Board and Committee meetings.

Cash Management:

- Lead HMT’s cash management strategy in coordination with CEO.

- Manage operating and reserve cash balances and oversee disbursement process.

Vendor and Relationship Management:

- Manage relationships with HR, IT and finance vendors (including banks and insurance providers).
- Review contracts for all potential vendors in relation to compliance and budget items.

Human Resources Administration:

- Ensure HMT's HR policies comply with all applicable regulations and laws.
- Manage relationships with payroll and benefit providers.
- Manage and optimize the employee-facing HR database (Paylocity), including staff surveys, performance reviews and HR administrative items.

IT and Facilities:

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

Strategic Leadership:

- As a member of HMT's executive team, play a key role in setting and leading the organization's culture and strategic direction.
- 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.