



## VP OF FINANCE AND OPERATIONS POSITION DESCRIPTION

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<b>EFFECTIVE DATE:</b> <u>017/12/2024</u>	<b>PROGRAM:</b> <u>Operation</u>
<b>FLSA CLASS:</b> <u>Exempt</u>	<b>DRIVING CLASS:</b> <u>Required</u>
<b>FTE STATUS:</b> <u>1.0 (Full-time)</u>	
<b>REPORTS TO:</b> <u>CEO</u>	
<b>SUPERVISES:</b> <u>Office Coordinator, Finance, HR, Facilities, Retail, Education</u>	

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### GENERAL SUMMARY:

The Vice President for Finance and Operations provides financial and operational leadership and direction, broadly defines and articulates metrics for institutional success, and, in conjunction with the CEO, provides short- and long-term strategic goals and objectives. This position oversees and ensures that all business and operational aspects of the Trust reflect and are in alignment with the institution's core educational values, as well as with the Trust's overarching mission and vision. In addition, the Vice President provides oversight of the Trust's Finance and Human Relations functions as well as America's Car Museum's operations and staff. As such the VP directs and coordinates the Office Coordinator, and Education, Facilities/Security, and Retail departments, the Café contract, and related functions, and oversees and maximizes the financial contribution of Museum's earned revenue-generating activities. The VP serves as a liaison for these departments with the CEO and the Board, and cross-functionally with the Institutional Advancement efforts of the Trust. In the event of the absence of the CEO, this individual is often charged with day-to-day leadership decisions.

Responsibilities include but are not limited to: Monitoring all expenditures; Overseeing audit responsibilities; Managing the investment portfolio; Directing and overseeing AAT staff in the areas of Finance and Human Resource and Museum operations staff. Overseeing annual operating and capital budget planning; Coordinating strategic planning for the Museum; Ensuring that day-to-day functioning of the Museum meets and furthers objectives; Participating with top management in the development of long-range plans; Conducting performance appraisals; Managing necessary capital improvements; Reviewing service contracts; Collaborating with the Human Resources Manager on personnel-related functions; Formulating, recommending, reviewing, and implementing organizational policies and procedures; Serving as staff liaison to the Finance Committee of the Board of Directors.

This position requires strategic planning and discretion to make decisions in support of the organization's objectives and educational goals and an ability to work independently to fulfill the responsibilities described herein, while maintaining a team-oriented approach and attitude.

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This position description has been designed to indicate the general nature and level of work performed by jobholders within this role. It is not designed to contain, or to be interpreted as, a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to the job. To perform the job successfully, an employee must perform each essential responsibility satisfactorily. These requirements are representative, but not all-inclusive, of the knowledge, skills, and abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

## **PRIMARY OBJECTIVES:**

1. Provide leadership, strategy, and direction, in accordance with the directives of the CEO and Board to further support and promote the mission of America's Automotive Trust.
2. Oversee the preparation of the annual operating and capital budget, direct the accounting and related financial activities, and establishing internal controls to safeguard the assets of the Trust including those of America's Car Museum and the RPM Foundation to ensure long-term fiscal health of the organization.
3. Direct and supervise the Trust's financial and budget activities to fund operations, maximize investments, and increase efficiency while maintaining an ongoing dialogue with the Development Department to track fundraising and other revenue-generating activities, to ensure that budgets and revenue projections reflect the fiscal realities and direction of the institution.
4. Analyze Museum operations to evaluate performance of the museum and its staff in meeting objectives and to determine areas of potential cost reduction or program improvement.
5. Develop, coordinate, and execute policies and procedures affecting all areas of the Museum's operations, provide for successful integration of Museum-wide activities, and formulate policies to ensure best practices, non-profit integrity, and ethics in accordance with legal statutes and current standards of the field.

## **MAJOR RESPONSIBILITIES:**

1. Monitor all expenditures, oversee audit responsibilities, and manage the investment portfolio.
2. Direct and oversee AAT staff in the areas of Finance and Human Resources and Museum operations staff and Office Coordinator.
3. Oversee AAT annual operating and capital budget planning and coordinating strategic planning for the Museum operations.
4. Ensure that day-to-day functioning of the Museum meets and furthers objectives, that departments achieve annual goals, and participating with top management in the development of long-range plans.
5. Conduct performance appraisals and ensure that Museum operational staff is cross trained.
6. Manage necessary capital improvements, plan and direct approved capital improvements, and review service contracts.
7. Collaborate with the Human Resources Manager on AAT's personnel-related functions, including hiring, training and development, benefits planning and administration, compliance, and termination actions, reviews, employment contracts, employee counseling, administration of personnel files, and compliance with Washington State Labor Code.

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8. Formulate, recommend, review, and implement organizational policies and procedures.
9. Serve as staff liaison to the Finance Committee of the Board of Directors.
10. Purchase oversight responsibility for the overall organization.

## **QUALIFICATIONS:**

The incumbent for this position must be at least 21 years of age and possess: A valid Driver License; A Bachelor's Degree in Business Administration, Marketing, Communications, or English (Other degrees may be considered based upon relevance); MBA preferred; A minimum of five years' at a senior managerial level in a museum, nonprofit organization, business, or in financial management; and, A proficiency in the use of MS Word, Excel, PowerPoint and Outlook. Additionally, the incumbent must be a team player, able to work independently and collaboratively within an interdepartmental collaborative environment.

## **Additionally, the incumbent must possess:**

1. The ability to pass an in-depth background investigation including criminal history, employment records, and personal references.
2. A solid proficiency in the English language with professional communication skills including excellent written, oral, presentation, and interpersonal skills.
3. Ability to develop and maintain organizational structure, provide strong leadership, vision, and strategic direction.
4. Significant experience working with external boards and committees.
5. Knowledge of current management and leadership methods and practices and the ability to direct and supervise the work of others.
6. Demonstrated knowledge of standards and best practices for museums, non-profits, or similar organizations, as well as a history of involvement in relevant professional organizations.
7. A strong understanding of debits and credits.
8. An appreciation for historic and collectible vehicles.
9. The ability to communicate and work effectively with a variety of internal and external stakeholders.
10. The interpersonal skills, sensitivity, and ability to professionally interact with a diverse range of people of all ages, socio-economic groups, and personality types.
11. The ability to stand and sit for extended periods of time, bend stoop, and twist regularly, manipulate items with fingers frequently, operate a computer regularly, visually inspect displays/monitors, read and interpret manuals and instructions, critically analyze and resolve quantitative, and logistical problems, and effectively communicate verbally, and in written format.

## **WORKING CONDITIONS:**

1. Exposure to an office environment on a regular basis with limited exposure to shop, commercial retail, commercial food, and outside environments.
2. Minimal exposure to cleaners and various other chemicals.
3. Minimal exposure to dust, gases, and fumes.

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# **RESPONSIBILITIES:**

## **SUPERVISION & LEADERSHIP:**

1. Manage and oversee all direct reports and departments.
2. Collaborate with department managers to establish departmental goals and plans in support of short and long-range plans.
3. Oversee personnel-related functions, in conjunction with the HR Manager, including hiring, training and development, benefits planning and administration, compliance, salary determination, and termination actions, reviews, employment contracts, employee counseling, administration of personnel files, and compliance with Washington State Labor Code.
4. Provide leadership, strategy and direction, and take the lead in developing best practices in all phases of administrative, financial, and operational aspects of the Museum in support of the CEO.

## **ADMINISTRATIVE:**

1. Assume primary responsibility for the coordination of strategic planning for the Museum.
2. Ensure the functional optimization of the physical plant, in collaboration with the Facilities Manager, by addressing operational, aesthetic, security and safety issues in the most cost-effective manner and assure that the building maintains highest standards for cleanliness and attention to detail in both public and office spaces.
3. Develop and oversee a comprehensive, competitive risk-management insurance program, supervise a risk-management schedule of insurance coverage which protects Museum property and assets at appropriate levels, and regularly review with carriers and brokers to assure best protection at competitive price.
4. Negotiate all non-automotive insurance contracts and act as primary point of contact for insurance broker, assess and manage risks, monitor claims, and ensure adequate coverage for all aspects of Museum operations, as well as the Museum collection.
5. Manage necessary capital improvements, plan and direct approved capital improvements, and review service contracts.
6. Formulate policies to ensure best practices, non-profit integrity and ethics in accordance with legal statutes and current standards of the field.
7. Contribute to the creation and stewardship of organizational culture and ethos, both internally and externally.

## **BOARD:**

1. Attend all Board meetings and serve as liaison to the Finance Committee.
2. Ensure the delivery of enhanced financial reports, forecasts, and analysis to the Board to facilitate decision making, long-range strategic planning, creativity, flexibility and responsiveness.

## **FIDUCIARY OVERSIGHT:**

1. Oversee the preparation of budgets for approval, including those for funding and implementation of programs.

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2. Direct the accounting and related financial activities, recommend appropriate policies, and establish internal controls to safeguard the assets of the Trust, Museum and RPM Foundation.
3. Manage the investment portfolio.
4. Oversee the annual audit.
5. Manage necessary capital improvements, plan and direct approved capital improvements.
6. Through measured and thoughtful engagement and analysis, instill a sense of transparency, accountability and ownership, and facilitate financial decision making and discipline at all levels.
7. Manage the production of all financial reports, including monthly financial statements.
8. Review monthly analysis of performance and reforecast annual budget as required.
9. Supervise the preparation of the 990-tax return.
10. Communicate financial information and recommendations to the CEO and the Board in a timely manner.

**OTHER:**

1. Maintain a flexible schedule and works weekends and late nights, as needed.
2. Attend meetings as needed or requested.
3. Drive personal vehicle for business purposes, as needed.
4. Utilize MS-Word and Excel to generate communications and reports.
5. Utilize MS-Outlook for email communications and calendar scheduling.
6. Participate in on-call responsibilities in emergency situations.
7. Perform other duties as needed.

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Signature

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Date