Job Description

Senior Finance & Operations Manager

Job Title:	**Senior Finance & Operations Manager**
Location:	**Helena Office**
Reports to:	**Executive Director**
Position Type:	**Full-Time / Exempt**
Compensation Range:	**To be determined based upon experience**
Supervisory Responsibilities:	**Yes**
Cross Trained Duties	**All operations key functions**

GENERAL POSITION DESCRIPTION:

The Senior Finance & Operations Manager provides leadership and oversight of Montana Business Assistance Connection's (MBAC) financial management, grant and fund administration, daily operations, facilities, customer service, and human resource functions. This position serves as a key organizational resource for the Board, leadership, staff, funders, financial institutions, and community partners, ensuring operational effectiveness, financial accountability, and compliance with organizational and funding requirements.

A primary responsibility of the position is grant, fund, and financial management oversight, including the administration, tracking, reconciliation, and reporting of multiple funding sources, grants, contracts, and revolving loan funds. The position oversees accounts payable and receivable, banking and cash management, payroll, financial transactions, budget monitoring, and month-end and year-end reporting. Particular emphasis is placed on funder compliance, restricted fund management, financial controls, reporting accuracy, and the responsible stewardship of organizational and program resources.

The Senior Finance & Operations Manager supervises the Accounting Assistant and coordinates closely with executive leadership, lending staff, auditors, financial institutions, funders, and professional service providers. The position plays a critical role in strengthening financial systems, maintaining audit readiness, supporting organizational decision-making, and ensuring MBAC's financial and operational practices align with its mission, contractual obligations, and long-term sustainability.

PRIMARY SERVICE ROLES AND RESPONSIBILITIES:

Senior Accounting and Finance Management

- **Oversee grant, fund, and financial management;** oversee administration, tracking, reconciliation, compliance, and reporting across multiple funding sources, grants, contracts, and revolving loan funds.
- **Implement and maintain internal controls;** coordinate appropriate sources to develop, implement, and maintain accounting, IT and data security, grant and restricted fund accounting, and related lending internal control policies and procedures.
- **Ensure compliance and adherence;** support organizational compliance and adherence with required local, state, federal government reporting requirements, and accounting standards and best practices.
- **Support budgeting, forecasting, and cashflow management;** assist in annual budget preparation, budget to actual management and analysis, cashflow management and special finance projects and forecasting as requested.

- **Prepare and verify financial transactions across systems**; prepare and verify ACH payment files, bank and loan transactions, loan system transaction conversion, upload and reconciliation process into accounting system.
- **Support payroll management and process reporting;** process employee deductions and retirement deposits and serve as backup for payroll processing and validation.
- **Perform period end close, reconciliations, and reporting procedures;** perform monthly, quarterly, and year end required closing including 990 tax form preparation, monthly bank and loan fund reconciliations.
- **Assist loan officers in report and request management;** assist in preparing and submitting monthly and quarterly reports for lending agencies, grant reporting, drawdown requests, and servicing transactions.
- **Coordinate annual audits and reviews;** coordinate documentation for audits, funder reporting, assist in risk management and mitigation, and support change requirements to resolve findings.
- **Supervise Accounting Assistant;** performance manage and coordinate routine accounts payable, receivable, payroll and general accounting functions.

Human Resources Support

- **Support employee recruitment and retention efforts;** coordinate position posting, interviewing, hiring and onboarding processes.
- **Maintain confidential employment records;** obtain and maintain confidential employment records including but not limited to employment, payroll, benefits, PTO, leave programs, and approved accommodations.
- **Maintain employment policies and processes;** coordinate timely updates and accuracy of handbooks, benefit packages, and compensation plans.
- **Oversee employment administration for a small team**; provide oversight and guidance to ensure compliance, accuracy, and timely processing of payroll, benefit enrollments, performance reviews, and related workplace and employment actions including disciplinary, grievances, and complaints procedures.
- **Ensure compliance;** ensure compliance with applicable labor laws, EEO, OSHA, and other applicable regulations.

Other Finance and Operations Management Activities

- **Coordinate daily office operations;** maintain and provide support to ensure efficient daily operations, workflow, system functionality, and service ready workplace.
- **Maintain operational policies and procedures;** implement and maintain governance, operational, employment, and financial internal control policies, procedures, checklists, and documents.
- **Assist monitoring of office property, plant and equipment;** coordinate routine facilities operations and maintenance, manage building access and secure protocols, coordinate vendors and service providers.
- **Execute financial controls & compliance;** develop and follow established financial controls, policies, and procedures, support process and workflow improvements, identify and report discrepancies to direct supervisor, support implementation of audit and funder requests.
- **Support system utilization and efficiency;** effective utilization of core operating, financial and lending systems, technologies, tools, and techniques to improve operational efficiency and quality controls.

- **Uphold professional and regulatory awareness;** stay current with industry trends, accounting regulations, grant and funder compliance requirements, and related professional development.

GENERAL WORK EXPECTATIONS

All MBAC employees are expected to:

- Follow instructions, procedures, and assigned responsibilities; seek clarification when needed.
- Maintain professional, respectful, and service-oriented interactions.
- Protect confidential borrower, employee, financial, and organizational information.
- Arrive on time, prepared to work, and report absences appropriately.
- Follow MBAC operational, financial, lending, technology, and administrative policies.
- Comply with applicable legal, funder, safety, security, and workplace requirements.
- Follow policies regarding smoking, alcohol, illegal substances, weapons, and prohibited activities.
- Remain attentive, productive, and engaged throughout the workday.
- Maintain organized, secure, and professional workspaces and records.
- Protect MBAC property, systems, information, and organizational resources.
- Promptly report safety, security, financial, or compliance concerns.
- Demonstrate sound judgment, accountability, teamwork, and responsible stewardship.

EXPERIENCE/EDUCATION/LICENSES AND CERTIFICATIONS NECESSARY:

- Bachelor's degree in business, accounting, or related experience (preferred).
- Prefer nonprofit or economic development experience, QuickBooks or similar accounting software experience, grant or fund accounting experience, and loan servicing experience

- Reporting, month-end close, and audit support experience.
- Strong organizational skills, deadline management, and problem-solving abilities.
- Ability to demonstrate confidence and sound judgement, effective teamwork, attention to detail, and analytical thinking.
- Strong leadership abilities to effectively supervise team members and work with cross-functional teams.
- Ability to lead multiple large-scale projects and teams.
- Ability to multitask and make decisions in complex, dynamic work environment.

WORKING CONDITIONS/PHYSICAL REQUIREMENTS:

Work Environment

Work is performed in an office environment with frequent use of computers, telephones, and other standard office equipment. The position may occasionally require visits to service area sites or vendor meetings.

Physical Demands

Frequently sitting, standing, moving within office, between meetings, and at event environments; lift or carry typical office, meeting, or materials weighing up to 50 pounds; occasional heavier lifting may be required with assistance. Ability to work in shared environments. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of the position.

Job Description

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Position Type/Expected Hours of Work
This is a full-time position. Agreed upon work hours are usually between 8:00 a.m. to 5:00 p.m. Monday – Friday.

Travel
Travel is limited but may be required for educational purposes.

AAP/EEO STATEMENT
Montana Business Assistance Connection, Inc. (MBAC) provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, amnesty or status as a covered veteran in accordance with applicable federal, state and local laws. MBAC complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

OTHER DUTIES AND NOTICES
Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

_____	_____	_____
Employee Printed Name	Employee Signature	Date
_____	_____	_____
Supervisor Printed Name	Supervisor Signature	Date