

United Way of West Florida Position Description

Latest Revision Date: September 2025

Incumbent/Candidate: Open

Position/Title: Accounting Specialist

Reports to: Director of Finance

Exempt/Non-exempt: Non-exempt

Pay Rate: 20.00 an hour

General Purpose:

The Accounting Specialist provides clerical and accounting support to the Director of Finance. In addition, this position will provide payroll and human resources support to the Director of Operations. This position is a key member of the Finance Team. The Accounting Specialist provides the support necessary to ensure that financial and payroll records are up to date, and reports are submitted in a timely manner.

Essential Accounting Functions:

- Accounts Payable – Process vendor invoices, preparing checks or electronic ACH to vendors and reconcile vendor credit accounts, with focus on ensuring accurate entry, elimination of any duplicate payments, no late fees or interest charges incurred
- Process payables for fund allocations, invoices, and purchase orders.
- Grants – Provide accounting support for federal, state, and local funding, including reimbursement-based grants.
- Reimbursement Grants – report expenses to the appropriate reporting platform for reimbursement grants, with a focus on ensuring accurate entry, timely reimbursement requests, and timely payments to partner agencies.
- Accounts Receivable – Process customer invoices, bill customers for amounts due, apply customer payments against outstanding receivables, and follow up on customer accounts that are past due, with focus on ensuring accurate billing and collections.
- Workplace Campaign – Assist development department in successful processing of campaign; receive campaign envelopes, post totals to campaign, verify cash and checks for deposit with Director of Finance, and perform audits on envelopes not detailed by self.
- Process, post, computer entry (detailing), and audits of Campaign Packets.
- Process, post, computer entry and mailing of all receivables - including, but not limited to, Annual Meeting, Day of Caring, Kick Off, and outstanding pledges.
- Provide support to other office staff as needed.
- Serve as a communication link, internally among staff and externally with constituents.
- Ensure that vendor and campaign envelope records are organized, stored, and readily accessible.
- Performs other duties as assigned

Essential Human Services Functions:

- Be the liaison between UWWF and Professional Employer Organization (PEO) for payroll needs
- Ensure bi-weekly timesheets are correct and approved by their supervisor
- Submit payroll to PEO in a timely manner
- Resolve payroll discrepancies and answer employee payroll queries

- Maintain job postings (Indeed, company website, CareerSource Escarosa etc.)
- Assist the Director of Operations with candidate interviews
- Keep up to date and accurate employee files

Other:

- Facilitate an efficient and effective flow of operations and assist in meeting supervisor(s) expectations.
- Maintain and foster a professional, responsible, reliable, and goal-oriented posture.
- Strive to maximize a team effort toward accomplishing the agency's goals.
- Assist the Director of Finance in all matters relating to fiscal and data collection.

Educational Requirements:

- College degree in accounting preferred.
- SHRM-CP certificate preferred

Experience and Skills:

- Trained in Accounts Payable (AP) & Receivables (AR) Management of Data and Processing of Data.
- Two or more years' experience in AP and AR, collections, and General Principles of Accounting.
- Competence in Microsoft Word and Power Point.
- Competence with Excel and similar spreadsheets
- Accurate data entry skills with great attention to detail
- Knowledge of Customer Relationship Management Systems (CRM) or database management.
- Confidentiality and respect for the privacy of employee records
- Strong organizational abilities to manage multiple tasks and meet deadlines while ensuring accuracy
- Superior customer service diplomacy
- Proficiency in use of office equipment
- Experience in IT helpful, not required

United Way Core Competencies:

- Mission focused
- Strong interpersonal skills
- Relationship-oriented
- Collaborator
- Results driven
- Brand Steward
- Team builder
- Self-management

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