THE DISCOVERY GROUP



Finance & Executive Operations Coordinator



The Discovery Group (TDG) is a boutique consulting firm dedicated to the social profit sector. We believe that social profit organizations can change the world. Our mission is to help our clients envision change, determine how to make it happen, and put the necessary tools and skills in place for success. We work with leaders who understand that aligning their purpose, board of directors and essential partners increases their organization's ability to succeed.

TDG provides services to support our clients in three interrelated areas of the social profit sector:

- Strategy, Board Governance and Planning
- Philanthropy and Campaigns
- Search and Leadership Development

Our purpose is to amplify positive change through our values:

- Always be learning
- Be compassionate
- Make it exceptional

To learn more about TDG, visit https://thediscoverygroup.ca.

Overview of the Position

The Discovery Group is seeking a full-time Finance & Executive Operations Coordinator to play an important role in the effective operation of our growing consulting firm.

Working closely with the Director of Client Delivery, senior leadership and consultants, this position brings together financial administration, executive support and business operations. The successful candidate will help ensure our financial processes are accurate and reliable, our leaders and consultants are well supported, and our day-to-day operations run smoothly.

We are looking for someone who enjoys working with numbers, keeping financial records accurate and organized, coordinating busy schedules and making sure the details are taken care of. The ideal candidate takes pride in being reliable, anticipates what needs to be done and enjoys helping a busy team work well together. The position reports to the Director of Client Delivery and works collaboratively with the Client Delivery Team, fractional CFO and external professional service providers.

Specific tasks will include:

1. Financial administration and reporting — 45%

- Prepare, issue and track client invoices, ensuring billing aligns with signed service agreements, project budgets, agreed payment schedules and approved expenses.
- Review consultant expenses, confirm billable amounts and ensure reimbursable project expenses are accurately and quickly captured and invoiced.
- Review and reconcile corporate credit card statements, staff expense claims and supporting receipts, ensuring expenses are properly coded and recorded.
- Process vendor invoices, accounts payable and payments, and follow up on outstanding client receivables.
- Coordinate payroll administration, including reviewing payroll information, processing approved changes, maintaining accurate records and liaising with TDG's payroll provider to ensure timely and accurate payment.
- Support payroll reconciliations and reporting in collaboration with the fractional CFO and external accounting partners.
- Maintain accurate records of service agreements, billing schedules, invoices, payments and project expenses.
- Identify opportunities to strengthen financial controls, processes and efficiency.

2. Executive and leadership support — 30%

- Coordinate calendars and scheduling for TDG's leadership team, balancing client commitments, project timelines, travel and internal priorities.

- Organize multi-participant meetings, interviews, planning sessions and client engagements, often involving several consultants, client representatives and external partners.
- Arrange travel, accommodation and meeting logistics for a consulting team working with clients across Canada.
- Provide executive and administrative support to the Managing Director, Co-Owner, and senior leadership team.
- Prepare meeting materials, coordinate agendas and support follow-up on key commitments as needed.
- Maintain accurate calendars and scheduling information, ensuring leadership and consultants have the details they need to arrive prepared.
- Anticipate scheduling challenges, respond to changing priorities and find practical solutions that make the best use of everyone's time.
- Manage confidential information with professionalism and discretion.

3. Business operations and administration — 25%

- Coordinate contracts, insurance, vendor relationships and administrative requirements.
- Support payroll, benefits and people administration in partnership with TDG's HR lead.
- Liaise with external accounting, technology and other professional service providers.
- Maintain organized records, administrative systems and operational processes.
- Work with the Client Delivery Team to support efficient project administration and information flow.
- Identify and implement practical improvements to how the firm operates.



Ideal Experience & Competencies

At TDG, we believe that different backgrounds, lived experiences and perspectives make us stronger. We work alongside social profit organizations striving to create a more equitable and inclusive society, and we believe those same values should be reflected in our own workplace. We are committed to building a team where people feel respected, valued and able to contribute fully. We welcome applications from people of all backgrounds and recognize that valuable skills and experience can be developed through different career paths.

We are looking for someone who brings:

- An ability to work both independently and as part of the TDG team, reflecting a commitment to TDG's values.
- A demonstrated commitment to the social profit sector.
- Experience coordinating meetings, travel, office operations and executive support, ideally in a professional services environment.
- Experience with invoicing, expense processing and financial reporting; familiarity with QBO accounting software and Smartsheet is an asset.
- Strong attention to detail and follow-through.
- Excellent written and verbal communication skills.
- Exceptional organizational and time management skills, with the ability to prioritize competing demands.
- A strong service mindset and a commitment to delivering an exceptional client and team experience.
- Strict adherence to confidentiality, discretion and professionalism.
- Proficiency with the Microsoft Office suite and the ability to learn new systems quickly.
- Awareness of, and sensitivity to, cultural uniqueness and norms, and a commitment to the principles of IDEA.
- Openness and flexibility in thinking, attitude and style.



Additional Context

We work with macOS; Microsoft 365 (Microsoft Word, Excel and PowerPoint); and social media platforms, especially LinkedIn. We also use document sharing, website and workflow apps (e.g. Teams, SharePoint, OneDrive, Acrobat and Smartsheet).

Our offices are located in Lower Lonsdale, North Vancouver, and are easily accessible by transit. This is a primarily in-office position, with some flexibility to work remotely by arrangement. Occasional schedule flexibility is also required during busy periods.

We work in a trusting and collegial manner, and it's crucial that all staff are kind and have a sense of humour.

Compensation & Application Process

We have a compensation budget in the $47,500–$68,500 range, plus benefits, including extended medical & dental coverage, a healthcare spending account and four weeks of holiday.

To apply, please send a cover letter and résumé together in a single document to:

Laura Stewart, Director, Client Delivery
lstewart@thediscoverygroup.ca



Navigating complex challenges for social profits

The Discovery Group is an international consulting firm dedicated to the social profit sector. We believe that social profit organizations can change the world. Since 2017 it has been our mission to help social profits across the globe achieve their vision and elevate community impact. We work side-by-side with our clients to help them envision change, determine how to make it happen, and put the necessary tools and skills in place for success.

www.thediscoverygroup.ca

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