

**Catholic Charities of Santa Clara County  
Chief Financial Officer**

***Silicon Valley's largest faith-based human services nonprofit seek an experienced, technically-skilled, agile executive to develop the finance and accounting infrastructure and processes to support growth and change.***

For over 60 years, [Catholic Charities of Santa Clara County](#) (CCSCC) has helped people of all cultures and beliefs rise up out of poverty and overcome barriers to self-sufficiency and wellness, taking into account the whole person, their family and life situation. Broadly, services include food, housing, health, education, emergency services, and economic security. Today CCSCC annually serves over 80,000 people at 90 locations.

The agency has embarked on an ambitious strategic direction to significantly disrupt poverty that affects the over 300,000 individuals in the County through systematic, scalable and measurable programs that break the cycle of poverty in the region. The Chief Financial Officer (CFO) is integral to creating an agile finance and accounting infrastructure to support growth and change, and to ensure transparency and proactivity.

The Chief Financial Officer reports to the CEO and as a member of the Senior Executive Team works closely with the Chief Programs & Strategy Officer, Chief Development Officer and Director of Human Resources. Initially the CFO will oversee a staff of nine.

**BASIC FUNCTION**

The Chief Financial Officer will be a hands-on individual responsible for all strategic and tactical matters as they relate to financial administration, budget management, analysis and reporting, risk management, financial modeling, revenue and expense forecasting, financial management of capital projects, treasury and cash management, banking, auditor and legal counsel relationships, and recognition of contracts and grants. The position requires an individual with strong business acumen who will personally grapple with and resolve issues in real time, ensuring that Catholic Charities' assets are protected. The CFO should have a growth and innovation mindset but be grounded in pragmatism, serving as advisor and implementer to the CEO and to the organization for financial policies, procedures and practices, and for agency-wide matters and new initiatives.

**RESPONSIBILITIES**

**IMMEDIATE PRIORITIES:**

- Understand Catholic Charities' people, culture, constituents, funding structures, programs, and current and future operational needs.
- Establish strong working relationships with the CEO, colleagues and direct reports, and the Chairs of the Board, Finance, Investment and Audit Committees; strengthen and sustain a culture of transparency, collaboration, communication, teamwork and integrity.
- Quickly assess the state of play for all finance and accounting activities and review systems, controls, operations and processes to ensure the integrity of financial information and reporting.
- Establish a positive work environment for the accounting and finance team; provide leadership, coaching and professional development to ensure staff has the tools to do their best work.

**FINANCE & ACCOUNTING:**

- Review, streamline and make transparent CCSCC's current financial apparatus; review chart of accounts, current accounting systems and control procedures, audit trails, financial documentation and workflows; ensure infrastructure allows for the flexibility required for growth.
- Ensure that actual expenditures are in alignment with budget plans; work with all departments to manage and control spending; forecast and manage cash flow to ensure that cash on hand is adequate to meet obligations and future needs.
- Oversee reporting for contracts, tax matters, coordination of compliance audits, collection of earned revenue, monthly and annual general accounting close and financial reporting; administration of financial relationships with partners and vendors that provide services to CCSCC or for whom CCSCC provides services; adhere to GAAP principals; facilitate and coordinate audit activities.
- In collaboration with the Chief Programs & Strategy Officer, assume responsibility for all contract management (purchasing, vendors, contactors) including the structuring of direct and indirect costs, and negotiation of contract applications, compliance and reporting.
- Provide accurate, timely and succinct information on the financial status of all programs and departments to the CEO, Board Chair and Board Committees upon request; develop long- and short-range financial plans and prepare accurate and timely financial and operating reports for the CEO and the Board.

**OTHER RESPONSIBILITIES:**

- Proactively provide leadership and guidance to the organization; specifically, provide expertise in all financial matters, voicing financial implications of pending decisions and capital projects.
- Provide exceptional leadership, coaching and professional development to the finance and accounting team; organization-wide, provide orientation and training to new staff and board members, and ongoing support to those with fiscal and budgetary oversight.
- In collaboration with Chief Development Officer and Chief Programs & Strategy Officer, lead the budgeting process, including the framework for budget preparation, reporting and variance analysis; create forecasts and other financial tools to support the development of philanthropic support and in reviewing programs from a financial perspective.
- Serve as the fiscal liaison and maintain positive relationships with funding sources, contracting agencies, banks, auditors, attorneys, vendors, current and potential business partners.
- Develop and utilize forward-looking, predictive models and financial analyses to provide insight into the organization's operations and business plans; responsible for all treasury functions, including managing cash and investment management.
- Assist the Director of Human Resources in the design, implementation and timely calculations of wages, incentives, and salaries.

- As the needs of Catholic Charities evolve, the CFO may assume additional responsibilities.

**IDEAL EXPERIENCE AND QUALIFICATIONS**

The ideal candidate should have the following experience and qualifications:

- A commitment to Catholic Charities' values, mission and goals.
- Ten+ years' experience senior leadership in charge of financial oversight and management in the nonprofit, public or business sector, and with an organization that has scaled.
- Experience in or knowledge of nonprofit accounting, including contract and grant accounting and revenue recognition issues; knowledge, experience and application of GAAP; background in managing general accounting, budgeting and planning, procedures and controls, and analysis and reporting.
- Business acumen and data-orientation to identify new opportunities and drivers of revenue generation and business decisions; a savviness to negotiate funding contracts.
- Comfort with technology; experience working with various computer and financial programs and platforms, nonprofit accounting and financial reporting systems; an ability to successfully integrate financial and information systems to support an evolving organization.
- An agile team player who understands and can communicate the business implications of plans and service strategies and who is able to creatively design and explore systems and procedures that fit current and long-term needs.
- Inspiring, intelligent, compassionate; ability to interact easily with diverse multi-disciplinary board, colleagues, staff, and stakeholders.
- Excellent communication skills, both verbally and in writing; analytical, with ability to convey complex financial information in a concise way, engaging way and to translate financial and accounting knowledge to those of all levels.
- The maturity to focus on effective and practical action; a person with integrity who is able to deliver both good and bad news and is able to solve problems; organized, reliable, consistent, extremely ethical.
- A Certified Public Accountant is preferred.

For more information please contact:

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