

**Community Action Marin
Chief Financial Officer**

Community Action Marin is seeking an experienced and agile financial leader to ensure sound financial and accounting practices and guide the executive team in technically-skilled decision-making to support growth and change, in service to providing the most vulnerable in our community the chance to move out of poverty and live with dignity and respect.

[Community Action Marin](#) (CAM) is the largest non-profit provider of social services in Marin County with a mission to alleviate the causes and consequences of poverty. For over 50 years, CAM has worked to help people attain self-sufficiency by providing childcare, mental health services, economic mobility, food security, homeless outreach, and a variety of safety net supports.

The agency's FY 2022 annual operating budget is \$21 million, with approximately 82% funded through federal, state and local government grants and exchange transactions. The agency has 200 employees and an executive team of key staff, including the CFO. The staff and many volunteers reflect the multicultural and multilingual diversity of the community. CAM is known for responsive programming and strategic collaborations with a number of public and nonprofit community partners.

BASIC FUNCTION

As a key member of the executive management team, the CFO will work closely with the CEO and the Board of Directors to craft and execute the agency's strategy, priorities, and goals in a way that positions CAM for transformative and sustainable impact. They must be able to adapt to a continually evolving environment, thrive in a quasi-governmental, yet autonomous and deadline-oriented workplace, and bring adaptive leadership skills to the agency and Executive Team. The CFO is responsible for all agency finance and accounting, IT, and operations teams (including contractors), as well as staffing the board finance, audit, and investment committees. They must have high professional standards and lead by example around the agency's core values of relationship, inclusivity, service, and unity.

PRIORITIES AND RESPONSIBILITIES

IMMEDIATE PRIORITIES:

- Quickly get to know CAM – its culture, constituents, funding structures, programs, current and future operational needs, people, its place in the community and its potential
- Establish strong working relationships with colleagues; strengthen and sustain a culture of transparency, collaboration, communication, teamwork, and integrity
- With the CEO and Executive Team, review, manage existing and establish new internal systems and controls, operations, processes and financial procedures to ensure the integrity of the financial information and reporting
- Work to finalize FY23 budget, maintain accurate projections, partner with Development on revenue pipeline/forecasts, and work with program directors to establish clear expectation for program fiscal management

ORGANIZATIONAL LEADERSHIP:

- Shape standards of excellence across all aspects of the agency's work; inspire all members of the agency's team to strive for standards of excellence; support and hold team members accountable in achieving them.
- Model the agency's values in everything from the biggest organizational decisions to the smallest one-on-one conversations; inspire others to express these values and support and hold team members accountable in living them out.
- Engage fully as a member of the Executive Team, actively shaping and demonstrating full ownership for all organization-wide decisions and providing other members of the team with the feedback and guidance they need to be successful.
- Fully represent the agency (brand, values, and vision) to relevant external stakeholders, including donors, funders, partners, community, and vendors.
- Act as a convener, connector, and community builder with other core functions (e.g., HR and Development) to strengthen internal systems and processes that connect to finance and business operations or otherwise impact the operational backbone of the agency.
- Proactively shape the culture and community by formally (if designated) or informally designing and overseeing team-building events and experiences, celebrating positive contributions to the community, and holding people accountable to agency's expectations against core competencies.
- Demonstrate a commitment to break down silos and reach across organizational teams and functions to make the agency a more cohesive, engaged, and connected place to work, as well as a more efficient, effective, and creative organization.
- Serve as the agency's point person for the Executive Team when the CEO is traveling or otherwise unavailable, including facilitating meetings and making time sensitive decisions (and engaging the Board when necessary).

FINANCIAL STRATEGY AND PLANNING:

- Partner with the CEO and Board of Directors to build a multi-year financial plan and underlying business model that supports the organization's priorities, reflects market realities and the agency's internal capabilities; ultimately enhance the long-term sustainability of the organization.
- Drive the agency's Finance, Investment, and Audit Committees, ensuring they have the information they need to oversee and improve the organization's near- and long-term financial health.
- Prepare and present key financial information to the Board of Directors on a regular basis (balance sheet, financial projections, income statements, cash flow analyses, etc.) and partner with the CEO to engage the Board in supporting the agency's financial health.
- Drive a cross-functional annual budgeting process with the Executive and Leadership Teams and Board to ensure effective planning and a budget that reflects the agency's strategic priorities.
- Partner with program teams to assess the financial viability of new opportunities and develop budget proposals to adequately resource against these opportunities.

- Design, organize, and operationalize the financial operations of the agency to support the organization's strategic priorities.

FINANCIAL MANAGEMENT:

- Support core function and program directors with, and hold them accountable to, all aspects of financial management for their functions or practices, including budgets and revenue planning, expense management, and all related decision-making.
- Prepare and share timely financial data that clearly articulates financial performance and health at the organizational and project-levels, empowering leads to make sound decisions and providing transparency to the rest of the organization where appropriate.
- Ensure strong internal controls, financial policies, and systems for all aspects of financial accounting (in line with GAAP, OMB, and relevant best practices) to eliminate risks and ensure responsible stewardship of the agency's resources (e.g., accounting policies and procedures, investment management policies, accounting systems, expense systems).
- Ensure all financial audits and related filing are completed on-time and in good standing.
- Design, manage, and continuously improve the processes and systems that enable financial management at the agency to thrive (from cash flow analysis and planning, internal and external reporting, and organizational and project budgeting and forecasting down to the agency's chart of accounts, Accounts Receivable and Accounts Payable, and time allocations).
- Manage the relationships with government fiscal leads and other key vendors and partners to ensure financial processes between the organizations meet needs, standards, and goals.
- Provide timely, accurate, and high-quality financial reporting to the agency's partners and funders, including ensuring compliance with their standards and requirements.
- Partner with the HR team to ensure human resources are effectively resourced against the agency's funding streams, while also solving for the needs of projects, partners, and individual team members.

OPERATIONS AND TECHNOLOGY LEADERSHIP:

- Ensure the agency has the business systems and processes in place (formal and informal) to efficiently and effectively manage the organization's network, pipeline, and human capital and ensure the organization is strategically using these systems to manage relationships, secure and stabilize funding, and allocate resources.
- Ensure the agency has the safety and security systems and processes in place (formal and informal) to effectively assess and manage safety-related risk and ensure the organization is using these systems to make sound decisions.
- Oversee the agency's technology service provider in service of ensuring the organization has the effective technology strategy, technology infrastructure, products and services, and helpdesk support to enable employees at all sites to do their best work.

COMPLIANCE AND RISK MITIGATION:

- Ensure the agency has the legal capacity and capability--through paid resources, pro bono support, or Board competencies--to manage risk throughout the organization (employment, contracts, and more).

- Ensure the agency is in compliance with relevant federal, state, and local agencies and laws.
- Oversee internal and external resources and work with partners and funders to ensure contracts are executed quickly and in a manner that reduces risks to the agency.
- Ensure the agency has adequate insurance coverage in place.
- Ensure compliance related to the Board of Directors - working with the CEO's Executive Assistant, work to ensure board terms, committees, minutes, etc. are in-line with the agency's bylaws and legal regulations

FINANCE AND OPERATIONS TEAM LEADERSHIP:

- Provide management and leadership of the accounting and operations teams, ensuring there are appropriate structures and strong management in place across all aspects of the accounting function (monthly close, AR/AP, payroll, procurements, etc.) and operations function (contract review and management, reporting, pipeline management, safety and security assessments and planning, etc.).
- Strategically lead the continuous growth and development of the finance and operations functions through an annual goal-setting process.
- Manage the performance and growth of Finance and Operations team members, including exemplar management of each employee's professional development process and ensuring they're getting real-time feedback (constructive and complementary about the work and how they're showing up to do the work).
- Support Finance and Operations team members in building relationships across the organization and maintaining a strong service orientation to the agency's service areas (and creating value through those relationships).

ADMINISTRATION:

- Ensure the organization completes and updates necessary business registrations and filings.
- Serve as the administrator of the agency's 403(b) plan.
- Partner with the HR director to oversee the annual process to review benefits, workers' compensation and related policies, and update the employee handbook as needed.
- Remain up-to-date and knowledgeable on practices, standards, and laws governing nonprofit organizations and feed this to the appropriate team members as necessary.
- Enforce the organization's signing matrix.

IDEAL EXPERIENCE AND QUALIFICATIONS

- Bachelor's degree in Accounting/Finance/Business Administration; a CPA and/or MBA highly preferred.
- At least eight years' experience in a financial leadership role, preferably with experience in a nonprofit with a budget of at least \$15 million and/or a highly regulated industry.
- Experience partnering with executive staff, resulting in the development and implementation of innovative fiscal, management and operational strategies.
- Demonstrated experience communicating and implementing operational changes at a large organization.

- Experience in or knowledge of nonprofit fiscal management and government contracts.
- Experience negotiating with a range of vendors and relationship building with sub-contractors.
- Excellent written and oral communication skills.
- Demonstrated leadership ability, team management, and interpersonal skills.
- Excellent analytical and abstract reasoning skills, plus excellent organization skills.
- Ability to work collaboratively with staff and contractors at all levels.
- Well-developed organizational skills and attention to detail.
- An innovative and initiative-oriented mindset that values teamwork and reaching goals.
- High proficiency with common accounting software and Excel.
- A strong commitment to social justice, equity and the agency's mission to provide high-quality programs to serve low-income individuals and families.
- Deep understanding – and ability to articulate – the role equity, inclusion, and diversity plays in our work.
- Experience serving on or working with a non-profit Board of Directors, specifically around implementation of a strategic plan and/or fiscal oversight.
- Experience working with government entities at the federal, state and local level.
- Experience with federal, state, and local funding sources. i.e. Head Start, CA State PreK, and Foundations.

PERSONAL CHARACTERISTICS

- A commitment to CAM's mission and goals, including culturally-competent service delivery in a community setting.
- The ability to interact easily with the board, colleagues, staff, and stakeholders. Excellent interpersonal skills with humility and the ability to interact with a diverse community and multi-disciplinary staff/
- The ability to communicate effectively in writing and orally; can communicate complex financial information in a concise way, engaging way; willingness to translate financial and accounting knowledge to all staff 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 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 that are consistent with CAM's mission and goals.

PHYSICAL REQUIREMENTS

- Lifting, raising or lowering an object from one level to another (including upward pulling) 10-25 lbs. on occasion.
- Standing, sitting and walking intermittently.

- Sitting stationary at a desk for extended periods of time using a computer.
- Ability to operate office equipment (computer, phone system, fax and copy machines).
- Ability to reach overhead, grasp, stoop; push and pull objects such as file cabinet drawers.
- Travel to local events, board meetings and agency sites as needed.
- Regular on-site leadership to facilitate solid working relationships with immediate team and other key program and department leads.

Flexible hybrid remote schedule

Salary range: \$180,000-\$200,000

For more information please contact:

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