



POSITION ANNOUNCEMENT

CHIEF FINANCIAL OFFICER



WHAT WE DO

For 25 years, The Community Foundation San Luis Obispo County has worked with partners to support a safe, healthy, and thriving community, through exceptional stewardship of funds invested with us. To date, the Foundation has awarded over \$66 million in grants and scholarships. As the region's primary provider of philanthropic services, we are dedicated to helping people achieve their philanthropic goals effectively, confidently, and with support from a team of experts connected to the needs of the community. Today, we are entrusted with over \$70 million in assets under management and continue to work in partnership with fundholders, local leaders, and community partners to transform the central coast region through strategic grantmaking and impact initiatives that foster a more vibrant and equitable community for all. For more information, please visit: www.cfsloco.org.

LEADERSHIP & CULTURE

The CFO will join a dedicated team of 11 exceptionally talented staff, working collaboratively to help shape the organization's future. As a member of the executive team, they will report to CEO, Heidi McPherson, a nationally recognized leader in the philanthropic community. Since joining the Foundation in 2014, Heidi's leadership and passion for philanthropy and community partnerships has enabled us to grow our assets by nearly 80%, significantly expanding our impact in the community. Our Board of Directors and staff are fully committed to our vision of improving the lives of all who live and care about the diverse communities of San Luis Obispo County. Our internal culture is based on inclusivity and transparency, with a focus on the professional development and well-being of every team member.

COMPENSATION & BENEFITS

- Salary: \$150,000 DOE/Neg.
- 100% employer-paid medical, dental, and vision insurance
- 401(k) with a 3% employer contribution

LOCATION

Our office is located in the heart of historic downtown San Luis Obispo. Our expectation is that the new CFO will be onsite initially, with flexible/hybrid arrangements available once they are fully established in the role.

POSITION SUMMARY

Reporting directly to our CEO, the CFO will also work closely with the Board of Directors, including our Finance & Administration, Investment, Real Estate Foundation, and Audit committees. They will manage a \$1.5 million annual operating budget, with overall strategic and operational responsibility for finance, operations, administration, and facilities, as well as our HR, IT, and other outsourced service providers. This is a highly visible role, both within the organization, and the greater San Luis Obispo community. The CFO will serve as another public face of the Foundation, attending events, speaking, and serving on panels. As a key sounding board and thought partner to our CEO, the CFO will work across every area of the organization, including organizational planning, development, and assessment activities. A member of our executive team, the CFO must be extremely collaborative, partnering with executives at other leading organizations to drive collective impact. This position is an excellent opportunity for a dynamic, charismatic, leader to play a significant role in supporting purposeful philanthropy for the San Luis Obispo region and beyond.

Priority areas in the first 12 months include:

- Build a deep understanding of the community and cultivate relationships with stakeholders.
- Support the strategic planning process, including the development of a comprehensive financial plan.
- Become familiar with our software platforms: FIMS (finance, accounting, and CRM), Community Force (grants management), and QuickBooks (Real Estate Foundation's accounting); make recommendations as to how we can fully utilize their capabilities.
- Analyze our current organizational structure, with a focus on accounting and finance systems and workflows; recommend opportunities for streamlining and modernization.
- Create a 100-day plan for your vision and priorities as CFO.
- Provide strong financial and strategic support to the CEO.

DUTIES & RESPONSIBILITIES

- In conjunction with the CEO, conduct long and short-term organizational and fiscal planning.
- Prepare budgets for contracts, programs, and projects.
- Monitor legal and tax developments pertinent to community foundations and take appropriate actions as needed.
- Maintain the fund accounting system for individual funds
- Ensure compliance with all fiscal contractual obligations.
- Proactively manage financial records, providing monthly and quarterly financial management reports, including financial analysis and cash flow projections.
- Recommend investment policies, procedures, and investments of reserves to the CEO.
- Present monthly financial reports to the Board of Directors.
- Provide staff support to the Board, Treasurer, and Board Committees.
- Conduct all finance and administrative procedures for the Real Estate Foundation (REF), including banking and preparation of financial statements, coordinating insurance coverage on properties, and consulting with title companies and real estate professionals on property sales.
- Oversee the completion of the National Standards accreditation process.
- Manage all vendor relations, including HR, IT, and facilities management.
- Supervise, coach, and mentor staff to achieve individual and organizational success.

- Anticipate organizational needs and proactively propose solutions.
- Actively communicate with staff to ensure that they have the tools, training, and direction needed to be effective in their jobs. Provide feedback, and model respectful and collegial behavior.

BACKGROUND PROFILE

- Passion and appreciation for the power of philanthropy to drive community impact.
- Strategic and hands-on approach to finance, accounting, and operations; adept at analysis, business planning, forecasting, and investments.
- Demonstrated experience with audit, legal compliance, and budget development.
- Successful management experience in overall business operations, including direct fiscal/operations, facilities management, and employee and vendor relations.
- Strong organization and prioritization skills with the ability to manage several projects simultaneously, with exceptional attention to detail.
- Highly self-actualized with strong initiative-taking; motivated, with a positive personality and excellent follow-through.
- Effective communication skills, written and oral; comfortable communicating key data, including presentations to senior management, the board, and outside stakeholders/partners.
- Ability to synthesize and translate complex financial data and concepts.

COVID-19 VACCINATION POLICY

Employees must be vaccinated or wear a mask while in the office.

FOR MORE INFORMATION OR TO APPLY, PLEASE CONTACT:

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