

**Position Announcement  
Chief Financial Officer**

**Location:** Oakland, California

**Department:** Executive

**Reports to:** President & CEO

**Deadline:** March 13, 2020

## About East Bay Community Foundation

Founded in 1928 and supported by over 400 local donors, the East Bay Community Foundation partners with fundholders, social movements, and the community to eliminate structural barriers, advance racial equity, and transform political, social, and economic outcomes for all who call the East Bay home. The Foundation is committed to advancing a Just East Bay; where all members of our community are treated fairly; resulting in equitable opportunity and outcomes for all.

Today, EBCF manages over \$800 million in community-based assets and offers charitable tools, funds, and investment options to enable donors to give smartly. For more information, visit [ebcf.org](http://ebcf.org)

## About the Position

The Chief Financial Officer (CFO) will play a critical role in leading the financial functions of EBCF, which holds more than \$800 million in assets. Reporting to the President & CEO, the CFO will manage a team of four; partner with colleagues on the senior leadership team of eight; and oversee budgeting, forecasting, reporting, financial analysis and accounting. The CFO will also be responsible for Investment Management, in conjunction with the President & CEO, Board of Directors and relevant committees of the Board.

This is an exciting opportunity for an experienced, collaborative and results-oriented financial leader who is committed to our vision of establishing an inclusive, fair and just East Bay, and motivated by working with an organization experiencing significant growth and change.

## Core Responsibilities

### Financial Management

- Develops financial strategy and models to support EBCF's mission
  - Oversees all finance and accounting functions, including financial reporting, audits and tax preparation
  - Works closely with the Board's Finance Committee and Senior Staff
  - Develops and manages dynamic financial and business planning models and metrics
  - Manages and anticipates opportunities and challenges related to financial systems
  - Establishes strong external relationships with auditors, attorneys, vendors, service providers and other financial entities
  - Ensures all financial audits and related filings are completed on deadline and that the EBCF remains in good financial standing
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### **Strategic Investment Management**

- Reviews and recommends strategic investment strategies to the President & CEO and Board of Directors
- Directs and provides oversight of investment management activity, working closely with Investment Advisors, the Board's Investment Committee and Senior Staff
- Serves as primary point of contact on all aspects of executing investment decisions approved by the Board of Directors
- Maintains records of all investments and is responsible for reporting investment performance to the Board
- Provides leadership and is responsible for strengthening EBCF's socially responsible investment strategies and policies

### **Team Management**

- Manages a team of four experienced team members across the Finance and Accounting functions
- Leads the team to achieve ambitious results while supporting a high standard of excellence, service delivery and accountability
- Builds team culture and supports team members' learning and professional development

### **Organizational Leadership**

- Provides strategic and financial guidance on all matters related to the President & CEO and various Board Committees
- Serves as a member of EBCF's Senior Leadership Team
- Partners with the Board and the Senior Leadership Team on key strategic issues and decisions, informed by rigorous financial analysis and risk assessment
- Contributes to an organization-wide culture of financial accountability that empowers leaders to take ownership of their team's budget and financial needs

## **Required Skills and Competencies**

### **The Ideal Candidate will have the following qualifications:**

- An MBA, CPA or both
  - Certification in Investments
  - A minimum of 7-10 years of Senior-Level Financial Management and/or Investment experience in the non-profit or philanthropic sector
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## EAST BAY COMMUNITY FOUNDATION

- Exceptional analytical skills, including financial planning, forecasting and modeling
- Demonstrated experience with banking and investment industries, including using environmental, social and governance practices for socially responsible and impact investing
- Proven financial systems literacy to evaluate and enhance current systems and processes
- Demonstrated passion for social justice, alongside excellent communication and relationship building skills to establish rapport and improve financial literacy at all levels of an organization
- Demonstrated team management and organizational leadership experience as a results-oriented leader who collaboratively develops data-driven, innovative and effective solutions
- Experience hiring and managing legal counsel and consultants
- Experience negotiating contracts, lease and general corporate agreements
- Familiarity with fund accounting and multiple giving vehicles in philanthropy, including trust and legacy gifts
- Familiarity with lobbying and advocacy standards and rules

### Compensation

This position offers competitive compensation and excellent benefits, in line with the field of philanthropy.

### How to Apply

The East Bay Community Foundation is partnering with [Walker and Associates Consulting](#) - a national strategic management consulting and search firm located in the East Bay - to facilitate this search. To apply, email a cover letter, resume and list of three references (candidates will be notified in advance of any outreach to your references) to [eastbaycommunityfoundation@walkeraac.com](mailto:eastbaycommunityfoundation@walkeraac.com) on or before 5:00 p.m. PST on Friday, March 13, 2020. Use the subject line: CFO Search. Submission via one combined PDF or Microsoft Word file is preferred. Resume review begins immediately.

*Questions or Nominations?* Email us at [eastbaycommunityfoundation@walkeraac.com](mailto:eastbaycommunityfoundation@walkeraac.com)

*The East Bay Community Foundation does not discriminate in employment opportunities or practices on the basis of race, ethnicity, religion, national origin, age, sex, sexual orientation, marital status, disability, or any other characteristic protected by law and is an employment-at-will company. EBCF is an equal-opportunity employer. People of diverse backgrounds are strongly encouraged to apply.*

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