



## JOB DESCRIPTION & POSTING

### Chief Financial Officer

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**Organization:** We open doors to Jewish life in Orange County. Jewish Federation & Family Services (JFFS) is Orange County's central nonprofit organization that strengthens Jewish life by assessing community needs; convening the community on critical issues and in times of crisis; increasing opportunities for participation in Jewish life, philanthropy, and leadership; and supporting our local Jewish community, as well as communities nationally, in Israel, and around the world. JFFS has been an active organization in Orange County since 1965.

**Position:** Chief Financial Officer

**Supervisor:** Chief Executive Officer

#### Job Summary:

The Chief Financial Officer (CFO) is responsible for all financial matters and oversees all fiscal and fiduciary responsibilities for the organization. This role will lead financial administration, business planning, and budgeting, as well as managing the Finance Team and providing strategic oversight for the Operations and Human Resources functions.

The CFO will report to and work closely with the CEO to set the organization's financial policy and direction, while also being an active participant in, and driver of, the organization's overall strategy. As a member of the senior leadership team, this person will be involved in strategic planning and evaluation, and will partner with senior leadership and the Board of Directors to develop and implement strategies across the organization.

The CFO will also oversee all compliance and recognition for government (federal and state) contracts and private grants. The person in this role must be able to adapt to a dynamic, mission-driven environment and thrive in an autonomous and deadline-oriented workplace.

#### Job Functions and Duties (including, but not limited to):

##### Strategy

- Develop tools and systems to provide critical financial and operational information to the CEO and make actionable recommendations on both strategy and operations based on financial analysis and projections, cost identification and allocation, and revenue/expense analysis.
- Participate in the ongoing strategic planning process and corporate policy development as an integral member of the senior leadership team.
- Oversee long-term budgetary planning and costs management in alignment with the organization's strategic plan.
- Assess organizational performance against both the annual budget and the organization's long-term strategy.

- Engage the Board of Director's Finance Committee to develop short-, medium-, and long-term financial plans and projections.
- Engage the Board of Director's Finance Committee around issues, trends, and changes in the operating model and operational delivery.

#### Financial and Operational Management

- Develop financial business plans and forecasts.
- Oversee all accounts, ledgers, and reporting systems, ensuring compliance with appropriate Generally Accepted Accounting Principles (GAAP), regulatory requirements, and budget audit requirements.
- Direct all financial, project-based, and departmental accounting.
- Ensure maintenance of appropriate internal controls and financial procedures.
- Oversee budgeting and the implementation of budgets; monitor progress and present operational metrics both internally and externally.
- Ensure timeliness, accuracy, and usefulness of financial and management reporting for federal and state funders, foundations, and the organization's Board of Directors; oversee the preparation and communication of monthly and annual financial statements.
- Ensure that finance staff maintains financial record systems in accordance with Generally Accepted Accounting Principles (GAAP) and monitor the use of all funds.
- Oversee cash flow and forecasting. Develop a reliable cash flow projection process and reporting mechanism that includes minimum cash threshold to meet operating needs. Optimize the handling of banking relationships and initiate appropriate strategies to enhance cash positions.
- Oversee cash, investment, and asset management.
- Coordinate all audits and proper filing of tax returns.
- Remain up to date on nonprofit audit best practices and state and federal law regarding nonprofit operations.
- Ensure legal and regulatory compliance across all financial functions.
- Represent the company to financial partners, including financial institutions, investors, foundation executives, auditors, public officials, and other individuals and entities.
- Attend Board of Directors meetings and lead and/or participate on assigned committees including the Finance, Audit, and Rose Project Committees.
- Review all formal finance- and human resources-related procedures, processes, and administration, recommending improvements to the systems in place and managing the systems going forward.
- Evaluate and oversee all benefits negotiations, thus providing the most competitive packages for the nonprofit organization's employees.

#### Team Leadership

- Mentor and develop members of the finance team, managing work allocation, training, problem resolution, performance evaluation, and the building of an effective team dynamic.
- Provide strategic operational and human resources oversight to applicable team members.

- Engage other members of the senior leadership team to facilitate cross-department collaboration, ensuring that all financial and human resources solutions positively support the organization's evolving strategy and operational delivery.
- Provide guidance on attracting and developing key team members for the organization as needed.
- Assist in selecting and engaging outside consultants (e.g., auditors).

## Qualifications

The CFO will be a senior-level professional with at least five years of experience in a CFO role. The person in this role will ideally have experience managing finance (accounting, budgeting, control, and reporting) for a complex nonprofit with multiple funding sources, including government (federal and state) contracts. In addition, the person in this role should have experience gathering and evaluating financial information and making actionable recommendations to senior leadership.

The CFO will have the following specific experience and attributes:

- BS degree; CPA and/or MBA preferred.
- At least five years' experience as a CFO or in an equivalent role with a budget of \$5-\$10 million or more. Nonprofit experience required.
- Experience in a senior financial management role, partnering with executive staff, resulting in the development and implementation of financial management strategies.
- Significant experience in or knowledge of nonprofit accounting, including sophisticated fund accounting and grant accounting, compliance, and reporting.
- Experience working with Blackbaud Financial Edge accounting software for nonprofits preferred.
- Experience in operations and human resources.
- An effective communicator at all levels of an organization, with strong oral and written skills.
- Demonstrated leadership ability, team management, and interpersonal skills, plus a strong commitment to developing team members.
- Proven effective leadership of professionals in finance and accounting.
- Excellent analytical and abstract reasoning skills, plus excellent organization skills.
- A collaborative and flexible work style with a strong service mentality.

## Salary

- Competitive salary commensurate with experience and education

To apply, please submit cover letter and resume to [sbrooks@oneoc.org](mailto:sbrooks@oneoc.org)

Only qualified local applicants will be contacted. EOE. No phone calls please.

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