



Chief Financial Officer Opportunity

UWBA is an equal opportunity employer committed to a diverse workforce. UWBA is committed to building and maintaining a diverse staff and an inclusive workplace that values equity. We welcome applications from immigrants, BIPOC, LGBTQ applicants, and people with lived experience in poverty.

Overview:

United Way Bay Area (UWBA) mobilizes the Bay Area to dismantle the root causes of poverty and build equitable pathways to prosperity. UWBA brings together partners from the nonprofit, business, and government sectors to address Bay Area poverty. We partner across sectors, develop solutions, capture the data we need, and use those insights to support public policy and create research-backed community initiatives. These initiatives include:

- **Housing Justice:** Improve access to stable, affordable housing and homelessness prevention.
- **Employment & Career Opportunities:** Build systems and pathways to career and employment opportunities.
- **Financial Stability:** Help families increase income and savings on their way to financial stability.
- **Basic Needs:** Ensure access to basic needs like food, housing, and legal services.

UWBA is committed to building and maintaining a diverse staff and an inclusive workplace that values equity. We particularly welcome applications from immigrants, BIPOC, LGBTQ+ applicants, and people with lived experiences in poverty. To foster an open and impartial application review process that minimizes the potential for bias, please remove any reference to academic institutions from which you obtained a degree, if applicable. For example, simply list “Bachelor of Arts in Sociology.” Not having a degree will not preclude you from being considered; applicable work experience is equally considered.

For more information about UWBA, please visit www.uwba.org.

The Opportunity:

UWBA seeks a strategic and entrepreneurial Chief Financial Officer (CFO) to lead the finance and infrastructure teams during a time of opportunity, challenge, and transition.

Reporting to the CEO, the CFO is a valued member of the Executive and Leadership Teams. The CFO staffs two board level committees—Finance (which also serves as the Investment committee), and Audit committee. As an organizational leader, the CFO works across the organization to insure sound financial management and a strong infrastructure. The CFO leads and supervises staff who manage the finance, human resource, information technology, and

facilities teams within an organization that raises approximately \$20 to \$30 million dollars annually. The CFO has two direct reports – a VP of Finance/Controller and a VP of Operations. Additionally, the CFO acts as the primary legal liaison with pro bono and paid counsel and is responsible for operational risk management activities. Finally, the CFO plays a crucial role in ensuring the success of UWBA’s Strategic Plan and DEI Action Plan, particularly the Operations and Culture Pillar of the Strategic Plan which focuses on ensuring our systems and internal culture is effective and equitable. As a nonprofit committed to centering equity on our pathway to becoming a more anti-racist organization, the CFO will need to have personal commitment to these goals as well. More information about our Strategic Plan and DEI Action Plan can be found at <https://uwba.org/who-we-are/strategy/>

As CFO, the successful candidate will play a pivotal role in creating, maintaining, and expanding transactional, financial, legal, and operational excellence.

What you’ll do:

Finance

The CFO will oversee the financial and accounting operations of the organization, through supervision of the VP of Finance/Controller, who supervises the accounting and finance team.

- Partner with members of the executive team to establish financial and strategic objectives, to implement organizational strategy, and to oversee mission critical projects and initiatives.
- Develop and evaluate short and long-term strategic economic objectives for the organization, ensuring always that they are aligned with overall strategy and mission.
- Collaborate with the VP Finance/Controller and the Senior Manager of Grants and Contracts to ensure best-in-class audit, general and grant budgeting, forecasting, financial reporting, and gift-processing functions.
- Serve as prime banking and Treasury relationship manager, negotiating loans and other credit facilities, and ensuring our Investments are in line with our board-approved Investment Policies and best practices
- Lead finance staff in the provision of timely and accurate analyses and financial reporting, thereby providing the highest level of executives and board financial oversight.
- Collaborate with both program and fundraising staff to provide leadership in developing and budgeting of program initiatives. Ensure established pricing captures and accurately reflects the full cost of creating, managing, and overseeing these programs, while being responsive to donor interests.
- Ensure compliance across the organization with governance requirements and applicable local state and national regulatory laws, and rules for financial and tax reporting, as well as United Way Worldwide membership compliance and reporting. Be bold to take action where non-compliance is identified.
- Staff two board level committees –Finance/Investment and Audit—and act as organizational liaison to investment advisors selected by the Finance Committee.
- Create a culture of excellence and customer service within the finance department, ensuring high level performance of accounting and gift processing staff.

Legal and Risk Management

- Act as primary liaison to outsourced General Counsel.
- Ensure that the enterprise risk management function is operating effectively to protect organizational staff, data, and assets—brand, financial, physical and intellectual property.

- Secure all necessary insurance and conduct periodic market surveys.
- Oversee review of all contracts, sponsorship agreements, and grant compliance documents, revising and negotiating as necessary.

Management of Human Resources, Information Technology, Facilities, Systems Change Management

Human Resources, IT, Facilities, and Systems Change Management are managed by the VP of Operations, who reports directly to the CFO, and supervises multiple directors and staff in performing these functions which include:

Human Resources

- Oversee payroll and benefits administration (inclusive of frozen pension plan), employee relations, leave management, performance and compensation management, recruiting and retention efforts, and professional development initiatives.
- Design, maintain, and source a cost-effective employee benefits program, with sustained attention to building an outstanding menu of offerings.
- Ensure compliance with changing array of local, state, and national labor policies as with union contract.

Information Technology

- Oversee information technology function serving approximately 65 employees in 2 offices.
- Partner with Director of IT and Facilities Manager to design, fund, and implement multi-year initiatives to keep equipment and software in state-of-the art status, insofar as limited budget allows.
- Collaborate with Director of IT and Facilities Manager to instill and enforce a security focused mindset across the organization, with a focus on meshing the ways people work with the need for ensuring that donor, client, and organizational data is protected.

Facilities

- Oversee the functioning of up to three offices, with an eye to safety, security, professionalism, and productivity, in a Hybrid work environment.
- Negotiate, secure, and administer property leases.

Who you are:

The CFO position calls for an entrepreneurial spirit, bold leadership, and financial savvy. Specifically, the successful candidate will have:

- 15+ years of professional experience in finance and operations, with at least 5 years in a senior leadership role, ideally at an organization with an operating budget of \$20M or more.
- Deep and continuously updated knowledge of nonprofit accounting.
- A strategic and visionary mind for problem-solving around core business challenges.
- Have a personal commitment to ensuring equity and inclusion are centered in organizational practices
- Demonstrated ability to balance big thinking with pragmatic implementation.
- Ease in building trusting relationships and inspiring confidence with a variety of stakeholders, including staff, Board members, peers, and external partners.
- A traditionalist when it comes to financial rigor, a modernist when it comes to systems, a risk taker when it comes to strategy, and a “roll up your sleeves” team member when it comes to getting work done.

Education:

- Bachelor's degree is required, preferably in business, accounting, or finance.
- Advanced degree, such as an MBA or an MPA, is desirable.

Salary: \$200,000 to \$240,000.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. Specific vision abilities required by this job include close vision, color vision, and ability to adjust focus.

UWBA does not discriminate on the basis of race, color, gender (including actual or perceived gender, and gender identity), sexual orientation, age, marital status, medical condition, religious affiliation, veteran status, national origin, citizenship status, mental or physical disability, or any other characteristic protected by applicable state, federal or local law. UWBA will consider qualified applicants with criminal histories in the manner consistent with the requirements of the San Francisco Fair Chance Ordinance. If you need a reasonable accommodation in order to apply for a job, please let us know. If the reason you need an accommodation is not obvious, we may ask for documentation confirming your functional limitations.

Please include salary requirements in cover letter. Please send inquiries to Mary Law at marylawexecutivesearch@gmail.com