POSITION TITLE: Chief Financial Officer
DEPARTMENT: Finance and Database Operations
LOCATION: Community Foundation for the Fox Valley Region 4455 W. Lawrence St.
Appleton, WI  54914
REPORTING TO: President & CEO
FLSA CLASSIFICATION (EXEMPT OR NON-EXEMPT): Exempt
CLASSIFICATION: Full-Time Benefits Eligible
LAST UPDATED: May 31, 2023

POSITION SUMMARY
The Chief Financial Officer is part of the Foundation’s dedicated team of professionals who work together under the core values of integrity, respect, teamwork, stewardship, and diversity, equity, inclusion, and antiracism (DEIAR) to support the strategic direction and mission of the Foundation, strengthening our community for current and future generations by helping people make a difference in the lives of all.

The Chief Financial Officer has a key role in executing the Foundation’s strategic plan and serves as the key advisor to the President/CEO for all matters relating to finance, internal technology, and administrative matters of the Foundation. This position is a member of the Community Foundation’s leadership team. The President/CEO will provide strategic direction and planning guidance to ensure alignment with the Foundation’s strategic plan.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Fundamental Responsibilities
- Provides support for implementation of the strategic plan, mission, and values of the Foundation.
- Leads the Finance and Database Team to excellence in their roles for the Foundation.
- Analyzes, forecasts, and provides insights on the Foundation’s financial position, stability, liquidity, and growth to the President/CEO and the board of directors.
- Supports the President/CEO in development and adoption of annual budgets.
- Provides research, analysis, recommendations and follow-through for the Foundation’s Board of Directors, its Investment Committee and Audit and Budget Committee.
- Directs the Finance and Database Team in providing and directing procedures and computer application systems necessary to maintain proper accounting records and to ensure adequate accounting and internal controls.
- Ensures the Foundation maintains accurate and effective processes, procedures, records and reports for its operations and to receive an unqualified, clean audit report from its independent audit firm.
- Ensures the gathering and assembling of the information for preparation of the 990 Forms for the Foundation and all its supporting organizations.
- Develops and maintains policies and procedures required for the financial statement, 990, and finance related National Standards certification.
- Manages relationships with outsourced Chief Investment Officer firm, other investment consultants, investment managers, custodians, and bankers.
- Provides research, analysis, recommendations and follow-through for the Foundation’s supporting organization, Community Real Estate and Personal Property Foundation.
- Supports the due diligence, acceptance, management, and disposition of non-cash gifts through the Community Real Estate and Personal Property Foundation.
• Administers and serves as a fiduciary for the Community Foundation retirement plans.
• Administers the Foundation’s insurance programs and recommends changes as needed.
• Serves as liaison with technology support partners and recommends changes as needed.
• Oversight of human resources for the Foundation, including employee compensation program and bi-weekly payroll.
• Administers the Foundations benefit plans, analyzing and recommending changes when warranted.
• Indirect supervision role as a member of the leadership team for work groups, teams, and others as assigned by the President/CEO.

This job description describes the general nature and scope of responsibilities for this position. Please note other duties and responsibilities may be assigned or removed at any time.

EDUCATION AND/OR EXPERIENCE
• Bachelor’s degree in accounting or finance or MBA with similar educational emphasis.
• CPA designation preferred. CFA or CMA are optional as preferred designations.
• Competency with Microsoft Office 365, including Excel, Word, and SharePoint.
• 10+ years of overall finance or accounting experience together with demonstrated leadership/ supervisory experience.
• Experience with investments, investment managers, consultants, and bankers preferred.
• Knowledge or experience with administration of compensation and benefit programs, insurance, technology, or operations preferred.

KNOWLEDGE, SKILLS, AND ABILITIES
• Mission-driven, servant leader who embraces both hands-on and strategic elements of a growing enterprise.
• Demonstrates teamwork, respect, integrity, stewardship, and DEIAR throughout work and interactions.
• Demonstrates a high level of integrity and strong ethical standards.
• Thinks and acts strategically about the finance, technology, and administration functions with plans for the long term while balancing short and long-range needs of the organization.
• Strong oral, written, and interpersonal communication skills.
• Leads by example and delegates effectively.
• Critical thinking skills and the emotional intelligence to collaborate with stakeholders.
• Proven history of leading a team as a developer of staff, coach, and mentor.
• Collaborates with leadership and other teams to support the Foundation’s mission.
• Acknowledges and accepts responsibility for errors and assumes responsibility to address appropriately. Approaches these situations as opportunities to gain experience, grow and improve systems for future success.
• Maintains confidentiality of the information with which the individual has contact.
WORK ENVIRONMENT AND JOB SPECIFICATIONS

The work environment and job specifications listed below are representative of those that must be met by an employee, with or without accommodations, to successfully perform the essential functions of this job.

- Primarily perform work in an office environment.
- Frequently move around the office and access or use computers, office equipment, telephone, and any other pertinent supplies, space or equipment used to perform the duties of the position.
- Work with frequent interruption
- Sit for extended periods of time.
- Lift and/or move up to ten pounds and occasionally lift and/or move up to 20 pounds.
- Travel occasionally to surrounding area businesses for events and meetings.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the position.