



Meaningful change is happening here. Be a part of it.

Overview of General Scope of Position

Under the direction of the Chief Executive Officer (CEO), the Chief Financial Officer (CFO) is responsible for the overall functioning of BI's Finance, Information Technology (IT), and Operations. Expertise in the realm of finance and business growth will be necessary in the CFO role, with the flexibility of growing knowledge and expertise in areas of IT and facilities. In partnership with the CEO, this role will execute the strategic plan and priorities of the organization, optimize future growth, and develop innovative approaches to support an ever-increasing demand for high-quality services for people with disabilities.

This role translates vision, mission, and strategy into operational tactics building organizational commitment and infrastructure. The CFO provides leadership and oversight to the directors/managers within each program to ensure the efficiency and effectiveness of the business's finance and operations, achievement of key performance goals/targets, and ensure that financial budgets/outlooks and customer satisfaction either meet or exceed expectations.

The CFO will lead BI's current finance, IT, and operations teams with the skills and strategic mindset necessary to foster an ever-growing, evolving, and at times complicated financial landscape.

BI has an authentic and established culture, with an employee relations philosophy recognizing that our employees are our most valuable assets. BI provides a healthy and positive work environment, illuminating clear channels through which each individual can feel included and connected. The Chief Financial Officer will be a prominent leader within BI and the larger community supporting the organization and its purpose. The ability to authentically connect with varying and diverse customer groups will be critical to the success of this role and the organization as a whole.

BECOMING INDEPENDENT JOB DESCRIPTION

<u>POSITION:</u>	Chief Financial Officer
<u>SUPERVISES:</u>	Finance, Operations, Information Technology, and Business Development
<u>SUPERVISED BY:</u>	Chief Executive Officer
<u>SALARY:</u>	DOE
<u>STATUS:</u>	Exempt

CRITICAL JOB FUNCTIONS

BI's CFO develops and executes overall Finance, Business Development, Business Process Improvement, and Operations strategy that aligns with the organization's purpose and objectives. Directs the development and implementation of policies and processes in areas including managing the depository and investment accounts, AP/Payroll, billing and AR, forecasting, and budgeting, as well as the business's annual audit. Ensures compliance with all local, state, and federal regulations and must have strong knowledge and experience in internal controls and GAAP.

GENERAL

- In collaboration with the Leadership Team, assist in formulating the company's future direction and supporting tactical initiatives.
- Act as a BI ambassador for all events and community partners engagements
- Assist the CEO in communicating policies, procedures, objectives, accomplishments, and general information to staff and the public
- Ensure compliance with all applicable local, state, and federal laws and regulations, and agency policies and procedures
- Oversee all day-to-day tactical administrative activities, systems, and processes

FINANCE

- Ensure financial practices are efficient and align with the agency's fiscal needs.
- In collaboration with the Leadership Team, manage the processes for financial forecasting and budgets and oversee the preparation of all financial reporting and capital requests.
- Participate in and provide financial presentations to the Finance Committee and Board of Directors
- Oversee the annual external audit process
- Prepare and analyze monthly financial statements (operating statement, balance sheet, cash flow projections, and statements of cash flow)
- Manage financial expenditures to ensure efficiency in administration and optimum functioning of all administrative support services
- Develop and monitor proposals for funding, business, and service development, in coordination with the CEO and Leadership Team.
- Develop and present financial models for new business opportunities, as well as sustainability modeling for current programs
- Provide strategic financial forecasts, analysis, and leadership on business models, e.g., evaluation of potential alliances, financial impact of contracts, and investments
- Provide input and direction in support of strategic business priorities and goals

FACILITIES & RISK MANAGEMENT

- Solicit, negotiate and maintain various lease spaces utilized to further BI's program/financial goals
- Oversee and maintain the agency's facilities, equipment, and other related resources.
- Maintain Property & Liability policies and ensure state and federal compliance.
- Ensure oversight of the agency's worker's compensation policies and process
- Act as the lead liaison for broker relationships and annual enrollments of said policies

INFORMATION TECHNOLOGY/MANAGEMENT INFORMATION SYSTEMS

- Oversee the agency's IT and computer systems, telephone systems, and related management information resources
- Develop and monitor the agency's Management Information System with the CEO and Senior Management.
- Develop and oversee annual IT plan, including proposal and implementation of IT updates and replacements
- Manage and oversee IT consultant relationship

LEADERSHIP COMPETENCIES

LEADS BY EXAMPLE

- Puts individual interests aside for the greater good of the organization
- Maintains staff enthusiasm and commitment through listening, understanding, and communicating effectively and in a timely manner
- Demonstrates the ability to self-reflect, admit mistakes, and course correct for the benefit of the team and organization
- Initiates and encourages opportunities for staff feedback, coaching, recognition, and encouragement while serving as a positive role model
- Seeks out and accepts feedback and is open to conflicting points of view. Can aim for excellence in all job tasks while showing grace under pressure
- Values others challenging the status quo and considers different points of view while seeking to reach a positive resolution

STRATEGIC

- Informed of industry and environmental trends and shifts
- Awareness of competition
- Demonstrates measured response to changes
- Broad organizational knowledge
- Displays initiative in shaping and supporting the organization's mission and vision.

INTEGRITY

- Communicates respectfully and demonstrates empathy through appreciating the perspective of others
- Demonstrates the courage to question potentially unethical actions or behaviors in self and others. Is open and honest in all interactions
- Fiscally prudent

QUALIFICATIONS AND REQUIREMENTS

EDUCATION:

Master's Degree in Finance, Business, or related field required. Degree in accounting or finance. CPA is a plus.

EXPERIENCE:

Eight (8) to ten (10) years of experience in financial management with increasing responsibilities for planning and growth.

- Financial accounting systems and databases; ability to analyze data, and prepare financial reports/statements
- Working knowledge of IT
- Building/facilities management
- Excellent written, verbal, and public speaking skills; and experience with supervising staff.

COMPUTER SKILLS:

Strong computer skills, including G-Suite required. ADP/HRIS experience preferred.

PHYSICAL REQUIREMENTS:

- A physical condition that permits frequent bending, turning, and lifting without injury
- Prolonged periods sitting at a desk and working on a computer
- Lift at least 40 pounds
- Clearance of pre-employment Functional Capacity Evaluation with no restrictions that cannot be reasonably accommodated without undue hardship

MAY REQUIRE ONE OR ALL:

- Valid California driver's license
- Insured, dependable vehicle
- Proof of COVID-19 vaccination or valid medical or religious exemption
- First Aid and CPR certification
- Criminal Record Clearance

OTHER REQUIREMENTS:

- Excellent analytical, judgment, time management, decision making, organizational and interpersonal skills.
- Excellent verbal and writing communication skills.
- Ability to maintain confidential and meticulous records.
- Detailed and thorough.
- Ability to support Becoming Independent's mission and vision.