



Chief Financial Officer

Filoli is a 654-acre historic site of the National Trust for Historic Preservation, located on the San Francisco Bay Peninsula near Woodside, CA, and one of the finest remaining country estates of the early 20th century. As a team member here, you will be able to connect rich history with a vibrant future through beauty, nature and shared stories. You have the opportunity to preserve, build upon and share the wonder of this place.

In our daily interaction with guests, we envision a time when all people honor nature, value unique experiences and appreciate beauty in everyday life. The Chief Financial Officer actively plays a part in creating a vibrant future through our 2019-2023 Strategic Plan. Embedding the core principles of Diversity & Inclusivity, Sustainability and Organizational Excellence into each pillar of the plan, we are focusing on five main pillars of our organization: People & Culture, Fundraising & Financial Strength, Infrastructure Investments, Visibility & Branding and Engagement & Education. We welcome and appreciate your contributions to Filoli.

SUMMARY

The Chief Financial Officer is a member of the senior management team and a partner to the Chief Executive Officer, providing leadership in the overall growth, management, and strategic planning of the organization. This position has three critical responsibilities: oversight of finance and accounting, development of people and culture, and management of business administration. Through a high level of financial acumen, the CFO leads the budgeting process, develops reports and communication tools to engage board and staff, oversees both internal and external audits, and performance analysis to maximize financial resources for the overall benefit of the organization. People are the most valuable asset of the Filoli business and it is critical that people management not only complies with required regulation but that creates and advances a welcoming and engaged staff and is continually advancing cultural development. Filoli is a national nonprofit leader and all levels of business administration should represent national standards of best practice.

This is a full-time, exempt position at a beautiful historic house and garden. Depending on candidate experience, the annual salary range for this position is \$182,000 to \$210,000. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. The CFO's schedule may change to meet the needs of the organization so flexibility is important.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:

Leadership

- Partner with the President & CEO, Senior Leadership, and Board of Directors to create and implement a bold vision that builds a sustainable organization for future generations;
- Serve as an independent senior leader of Filoli and act in the best interests of the organization as needed in the absence of the CEO;
- Participate as a member of the Senior Leadership in the development and implementation of organization-wide policies, strategies and programs that will contribute to its overall success;
- Oversee resource development and allocation for the organization and guiding overall budget principals;
- Serve as primary signing authority for checks, contracts and invoices;
- Support the fundraising effort through budget development, communication, grant management, and reporting;
- Develop comprehensive reporting mechanisms that meet internal management needs and provide analysis for future growth and development;
- Serve as Staff Liaison to Board Finance Committee and Audit Committee;
- Directly manages, represents and covers the responsibilities of all professional staff or relevant contract professionals reporting to them: responsible for scheduling, training, evaluating and all coordination with People & Culture;
- Represent Filoli nationally and serve as a national leader serving on boards, committees and supporting relevant initiatives;
- Fulfill expectations as listed in Filoli's Expectations for Directors, Managers and Supervisors;

Finance & Accounting

- In coordination with the Director of Finance & Accounting, oversee accounting, finance, organization-wide budgets, administrative purchasing and contracting;
- Provide strategic vision and planning to build long-term financial sustainability that supports a growing organization;
- Oversee all Filoli accounts and, if needed secure financing, to ensure resources are available to support Filoli's needs;
- Provide oversight on investments, as well as direct investment management to maximize financial resources for long-term organizational growth;
- Lead the annual budget and projections process providing needed training, templates, reports, and other materials to ensure engagement of all budget managers;
- Serve as the liaison for the annual audit, and oversee the development of the draft the annual financial statements in accordance with generally accepted accounting principles (GAAP);

- Collaborate with President & CEO along with the Chief Experience Officer (CXO), Chief External Relations Officer (CERO), Chief Development Officer (CDO), and other directors to optimize existing revenue streams (rentals, events, programs, admission, retail, membership, and fundraising) and to develop new and innovative programs to support continual organizational growth;
- Ensure timely and accurate analysis of budgets, financial trends and forecasts, and monthly financial statements and reports for each department;
- Develop and ensure effective internal controls are in place to safeguard assets and ensure compliance with all applicable federal, state and local laws and regulations;
- Ensure the appropriate relationships, contracts, tax filings and reporting are established with vendors or contractors providing products or services to Filoli;
- Partner with department directors and managers to provide training and ensure compliance with all policies and procedures of the organization;
- Identify, develop and implement best practice improvements to processes and procedures to achieve meaningful results, greater productivity, efficiency and consistency among departments;

People & Culture

- In coordination with the Director of People & Culture, oversee the human resources programs, ensuring an inclusive and integrated approach to all programs;
- Serve as institutional leaders in the oversight and implementation of the organization-wide Diversity, Equity, Accessibility, and Inclusion policy and action plan;
- Ensure the development, implementation and administration of human resources programs, procedures and guidelines to help align the workforce with Filoli's strategic goals;
- Ensure timekeeping, reporting, policies and management practices are aligned with relevant regulations and requirements, engaging professional legal support as needed;
- Create high quality and innovative recruitment, onboarding, training, and professional development programs to attract and retain a talented team;
- Ensure a robust offering of benefits and support ongoing bidding and renewals to ensure best value;
- Support staff health and wellness that encourages a flexible work environment, offers ongoing engagement programs and provides resources to encourage the highest level of success among staff;
- Oversee 401(k) and benefit compliance, including 401(k) plan audit, Form 5500 filing and other compliance requirements; coordinate related audits including workers compensation audit;
- Engage in compensation planning and budgeting; provide oversight to ensure equitable implementation of salary plans;
- Develop comprehensive assessment programs to encourage continual advancement;
- Ensure the equitable availability of professional development to create a culture of learning;

Administrative

- Ensure that the organization is in compliance with all required registrations, business licensing, reporting, and auditing;
- Oversee or provide input for benchmarking studies and surveys so that Filoli is represented within all sectors and ensure receipt of ongoing data to guide growth;
- Coordinate with the National Trust for Historic Preservation, owners of the site and some land holdings, on required reporting in line with the Cooperative Management, Lease, and Loan Agreements;
- Oversee the insurance and risk management program for Filoli managing regularly bidding and all claims;
- Ensure vendors and contractors are in compliance with Filoli, state, and federal requirements;

General

- Provide the highest quality service to internal and external customers in every interaction;
- Uphold all Filoli's policies, procedures, guidelines and standards;
- Maintain flexibility and perform other duties as assigned to respond to the needs of the organization;
- Attendance and punctuality are essential to work and all work-related functions.

SUPERVISORY RESPONSIBILITIES

Job titles of those who report **directly** to this position currently are: Director of Finance & Accounting (FT) and Director of People & Culture (FT) with other contractors and administrative support staff as needed for projects.

MINIMUM QUALIFICATIONS

An individual must be able to perform each essential duty listed above and any additional responsibilities as directed as well as satisfy the educational and skill requirements listed below:

Education: A Bachelor's Degree is required. CPA or equivalent accounting experience preferred. An advanced degree and/or specialize business training (MBA or equivalent) ideal.

Core Competencies:

- **ORGANIZATIONAL MANAGEMENT EXPERIENCE** – At least 5 years of experience serving as a member of the executive leadership team, providing guidance on organization's financial strategies and successfully implementing the overall vision, strategy, and organizational priorities. Experience developing creative structures of support/accountability among peers and teams. Strong administrative skills. Ability to multitask, see many sides to complex issues, and perform at high standards with a collegial team.

- FINANCIAL AND BUSINESS MANAGEMENT – Demonstrated success in financial and business administration, including experience in people and culture oversight. Possess knowledge of financial reporting for nonprofit organizations in accordance with Generally Accepted Accounting Principles (GAAP). Considerable experience creating, leading, and aligning organizational strategy with finance/budget, human resources, program development, organizational development, etc. Exceptional accounting, finance, and budget experience and ability to present such information which is accessible to various audiences.
- PEOPLE, PROJECT, AND PROGRAM MANAGEMENT SKILLS – Exemplary people management skills, strategic leadership abilities, and the ability to link the development of people with achievement of organizational outcomes. Effective team leadership skills. Cross-functional collaborative capacity. Ability to either take direction or work independently as the situation requires. Strong supervisory skills and proven success supporting staff development and empowerment. Demonstrated experience evaluating events, campaigns, or productions.
- LEADERSHIP – Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems. Capacity to interact effectively with Filoli's many constituencies including staff, Board members, community partners, individual and institutional donors, and community supporters.
- CULTURAL COMPETENCIES – Model a responsibility to self-awareness and awareness of others to recognize that individuals bring unique backgrounds, beliefs, values, and world-views. View racial and cultural differences as assets to the organization.
- DIVERSITY, EQUITY, AND INCLUSION – Commitment to integrate accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion of advancing organizational DEAI objectives and influencing others to approach all work with an equity lens. Promote processes and communication that encourage organizational cultural competence and inclusion.
- COMMUNICATION SKILLS – Exceptional oral and written communication skills including the demonstrated ability to research, and analyze information, compose reports and correspondence, and present proven data in a clear and inspiring manner.
- DECISIVE NATURE – Well-honed ability to independently anticipate and analyze situations, define problems and objectives, recognize viable alternatives and formulate rapid solutions, with understanding of the inherent risks and the implications of making tough decisions.
- COMPUTER SKILLS – Strong capacity for using financial databases. Proficiency with Google Suite and Microsoft Office applications. Proficiency in Financial Edge NXT (Blackbaud) or similar general ledger software and experience with 3rd party payroll services (Paychex preferred).
- AVAILABILITY – Maintain a flexible work schedule that includes evenings and weekends to meet the demands of executive management. Remote work is optional but no more than 25% on a regular basis.

Skills and Abilities:

- Demonstrate a deep commitment to and enthusiasm for the mission and vision of Filoli;
- Detail and results orientated with intentional use of data to improve performance and processing information to make astute recommendations and/or decisions;
- Possess an organized and strategic approach to business management with experience in financial management, an integrated approach to people and a culture and a successful history of setting and meeting realistic financial and organizational goals;
- Ability to partner effectively and diplomatically with the CEO and key members of the Board of Directors, as appropriate;
- Demonstrated success, with the ability to think strategically while executing tactically within a resource-constrained environment;
- Be an effective communicator who is articulate and persuasive in written and spoken communications with the ability to present complex data to multiple audiences;
- Highly motivated and energetic, ability to show initiative and work independently;
- Have experience managing a team of professionals, including the proven ability to mentor, train, and develop staff as well as the ability to create and maintain a collegial and positive work environment with high morale, professional standards and productivity;
- Display a high level of integrity and dependability with a strong sense of customer service, urgency, results-orientation, diplomacy, confidence and good humor;
- Ability to respectfully ask questions, challenge, and communicate both positive and difficult messages to subordinates, superiors, and peers; speaks about issues truthfully and without blame;
- Sound judgment regarding the appropriateness of guarding confidentiality to protect the privacy rights of staff or donors;
- Ability to work in a fast-paced, change oriented environment;
- Follow-through to successful completion of all projects and communications.

CERTIFICATES, LICENSES, REGISTRATION

A valid Driver's License is required.

PHYSICAL REQUIREMENTS

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job including:

- Lift/carry up to 20 pounds;
- Direct customer interaction;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend as well as sit for long periods of time at a computer and talk on the phone.

HOW TO APPLY

1. Candidates with the above prerequisites are invited to submit their resumes along with a cover letter outlining their related experience and background to:
<https://filoli.applicantstack.com/x/openings>
2. Possession of minimum requirements does not guarantee an interview.
3. Please, no phone calls.
4. Thank you for your interest in Filoli!

Please visit our website for more information: www.filoli.org

Filoli is an equal opportunity employer who values diversity in the workplace.