COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN, INC.

Position Description
Chief Financial Officer (CFO)

Mission: We match person philanthropy with community need.

Purpose: To design, maintain and monitor CFSW financial, investment and personnel/employee benefit systems in adherence to CFSW policies, National Standards for US Community Foundations, and Federal and State laws.

The Chief Financial Officer reports to the President/CEO.

Qualifications:
- Bachelor’s degree required; graduate degree preferred;
- CPA certification preferred, but not required;
- Investment experience desirable;
- 3 or more years of experience in accounting required, preferably in nonprofit accounting;
- 3 or more years auditing experience preferred;
- Working knowledge of financial management software.

Requirements: Strong organizational, managerial and analytical skills. Strong computer skills and extensive knowledge of Microsoft Excel. Ability to perform responsibilities in a professional manner and to handle assignments with a high degree of accuracy and confidentiality. Expected hours per week between 30 – 37.5 with benefit options available.

Major tasks and scope of responsibilities:

A. Financial Management:
- Maintain accounting records in accordance with generally accepted accounting principles;
- Manage the administration of accounting policies and procedures as well as the day-to-day accounting and internal control activities of CFSW;
- Provide staff support to CFSW Finance and Asset Management Committees and all other financial support needed to aid various committees and the Board of Directors in their decision making;
- Coordinate the development of annual operating, capital and grants budgets and submit to the President/CEO and the Finance Committee for review;
- Monitor approved operating, capital and grants budgets;
- Supervise the processing of all contributions to CFSW ensuring they are deposited with investment managers or financial institutions, credited to the proper funds, and administered according to the fund agreement and CFSW policies;
- Reconcile bank and investment statements;
Produce, monitor, and evaluate complex and challenging internal and external financial reports (historical trends, financial projections, key performance indicators, and other financial data necessary for effective operations and planning) for staff, board, and board committees;
- Reconcile fund accounts and, as needed, produce fund statements;
- Provide requested schedules, documents and files to CFSW auditors;
- Review tax returns and other regulatory filings for CFSW;
- Ensure legal and regulatory compliance in all aspects of operations;
- Review and evaluate insurance coverage of all kinds and ensure adequate coverage;
- Maintain the tax exempt status of CFSW;
- Monitor cash flow requirements and manage CFSW cash so as to maximize the return on investment.

B. Personnel and Benefit Administration
- Process payroll along with associated records and reports including state and federal filings;
- Administer the employee benefit programs along with associated records and reports;
- Aid in the formulation and implementation of employee personnel policies.

C. Information Systems Management
- Maintain a working knowledge of Microsoft Windows, Word, Excel and Foundation Information Management System (FIMS);
- Work with network support vendor to provide maintenance and support of computer network;
- Manage the maintenance of appropriate backup of computer software and files.

Other Responsibilities
- Participate in relevant professional associations;
- Fulfill other duties as assigned by the President/CEO;
- Supervise the Office Manager/Finance Assistant.

To Apply: Please send resume, cover letter and at least three professional references to Wyatt Jackson, President/CEO at jobs@cfsw.org. In the cover letter, please detail your salary requirements/expectations.