

Chief Financial Officer Job Description

Job Summary:

Joining the team at a pivotal moment in the Foundation's development, the Chief Financial Officer (CFO) will work directly with the CEO and Board to guide the Foundation's strategic vision and enhance its financial capabilities and investment portfolio. The CFO will lead development of the Impact Investing strategy, facilitating broad community networks across Dodge and Jefferson Counties to execute impact investments (loans, equity, guarantees) that further our community wellbeing goals. The CFO will provide day-to-day management and strategic oversight for the financial and administrative operations of the Foundation, our facilities and our place-based investments, ensuring Foundation investments are supported through strong administrative infrastructure.

The position provides a unique opportunity for a self-directed individual to play a critical role in building a new and innovative health foundation from the ground up.

Major Responsibilities:

Impact Investing

- Develop, implement and manage the Foundation's impact investing program
- Lead the Foundation's capital investment strategy in collaboration with the Board and Finance Committee: Identify and create transactions where debt, equity or guarantees can further program objectives; manage transactions; and monitor the financial and programmatic performance of investments over time
- Identify external and public sector investment partners, cultivate relationships and leverage Foundation investments with funds from other aligned investors
- Work with staff and consultants to assess, evaluate and disseminate results of programs and projects
- Provide or recommend technical assistance to investees within the impact investing portfolio on financial health, financing needs and project feasibility
- Provide strategic thought leadership for the Foundation's place-based affordable housing and rural community development strategies
- Stay current on relevant research and findings on impact investing, translating learnings to the local context to build local community development capacity
- Represent the Foundation with external audiences including local decision makers and regional philanthropic partners

Financial Management and Administration

- Provide day-to-day management of finance, accounting and administrative systems, maintaining excellent financial controls, records, policies and procedures
- Serve as the primary liaison to the Finance Committee
- Mentor program staff through the annual budgeting processes and ongoing review of financial reports
- Coordinate, monitor and report on the Foundation's investment portfolio performance. Serve as primary contact with investment advisors, impact investment partners and managers of our subsidiary corporations
- Oversee management of Foundation facilities including development and management of a social innovation coworking space
- Manage administration of payroll, employee benefits and compliance
- Coordinate legal, risk management and information technology resources
- Coordinate the preparation of audits, tax returns and all financial filings required by law, as well as ongoing monitoring of budgets and spending.



Minimum Qualifications:

- 5-10 years of leadership experience in finance, banking, real estate, private equity or community development
- Experience in change management and community development, rural experience a plus
- Proven financial analytical skills including ability to identify risks, opportunities, trends and relationships
- Proven experience creating something from scratch; entrepreneurial passion, vision and tenacity
- Minimum of BA in finance, community development or related field

Attributes:

- Strong manager, skilled leader, innovative collaborator and effective communicator
- Visible passion for breaking new ground to lead social change
- Strong relationship builder with the ability to find common ground, build consensus and strengthen collaboration
- An adept systems thinker, able to achieve quick wins while keeping the end game in mind
- A hands-on team player who takes pride in team accomplishments and is flexible to fill any gaps needed to achieve goals
- Unquestioned integrity and moral character
- Demonstrated maturity and seasoned judgement.
- Ability to make decisions, justify recommendations and be responsible and clear with stakeholders

Travel: Local travel to various worksites is required. Driver's license required.

Work Environment: While performing the duties of this job, the employee regularly works in an office setting.

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. While performing the duties of this job, the employee is regularly required to use hands and fingers to handle, feel or operate objects, tools or controls, and reach with hands and arms. The employee is frequently required to stand, talk and hear. The employee is occasionally required to walk, sit, climb, balance, stoop, kneel, crouch and crawl.

Other Duties: Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

About Us: The Greater Watertown Community Health Foundation is a catalyst for positive, lasting and measurable health improvement across the region. Our vision is a thriving community where *everyone* enjoys good health and wellbeing. Our mission is to inspire collaboration, mobilize resources and encourage innovation that measurably contributes to the wellbeing of our community.

To Apply: Please send resume and cover letter to Tina Crave, President & CEO, at tcrave@watertownhealthfoundation.com. In the cover letter, please describe: 1) what most interests you about this position and 2) a past accomplishment that demonstrates your entrepreneurial passion, vision and tenacity.

EQUAL EMPLOYMENT OPPORTUNITY - GWCHF offers fair and equal employment opportunity to all qualified job candidates regardless of age, race, religion, color, sex, marital status, sexual orientation, gender identity or expression, arrest record, conviction record, physical disability, developmental disability, national origin, membership in the National Guard, state defense force or any other reserve component of the military forces of the United States or Wisconsin, genetic information, marital status, or any legally protected status protected by law in the workplace.