



# CHIEF FINANCIAL OFFICER

March 10, 2025

CATHOLIC RECRUITER ASSOCIATES

EXECUTIVE SEARCH • MANAGEMENT CONSULTING



## BACKGROUND

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**Catholic Charities East Bay (CCEB)** aids and assists vulnerable communities within Alameda and Contra Costa Counties of the East Bay of California. Operations of CCEB started in 1935 when 36 Catholic Aid agencies in Alameda County consolidated to form a newly affiliated Catholic Charities serving the poor and marginalized during the Great Depression, and expanded to Contra Costa in the 1960s. Catholic Charities of the East Bay is a part of California's largest network of social service providers (**Catholic Charities of California**), which provides leadership, resources, and collaborative opportunities with the aim of expanding the professional delivery of human services to people of all cultures and beliefs throughout the state.

Led by **The Most Reverend Michael C. Barber, SJ Bishop of Oakland**, who was ordained to the episcopate and installed as the fifth Bishop of Oakland on May 25, 2013 in the Cathedral of Christ the Light, CCEB serves all and celebrates the diversity of its community, including people of all backgrounds, regardless of race, ethnicity, gender identity, sexual orientation, and religious or spiritual affiliation or belief. Catholic Charities of the East Bay's impact has reached 3,191 individuals last year and continues the mission of supporting children, youth, families, and seniors from crisis to stability.

## Position Summary:

The Chief Financial Officer (CFO) supervises the strategic direction and operational oversight of the Finance/Accounting Department. The CFO is responsible for creating and managing an effective and streamlined administrative/financial system. Responsibilities include accounting, financial reporting, entrepreneurial activities, investments, banking relations, budgeting, benefits, grant billing, and other financial activities as necessary and assigned. As a member of the leadership team, the CFO is jointly responsible for the efficient and effective operation of the agency.

## Responsibilities:

### Overall Leadership

- Commitment to the Mission and to Organizational Sustainability: Model commitment to CCEB mission and planning for sustainable organizational future of services, including work with the executive team and representation of the agency.
- Executive Team Collaboration: Work with other members of the executive team to create and continually represent a unified leadership perspective.
- Culture: With the other members of the executive team, ongoing work toward maintaining a results-oriented, learning organization culture to increase positive social impact.

### Strategic Management

- Overall Organizational Strategy and Indicators: Help guide the development of the overall organizational strategy and key indicators of success.
- Program Strategy and Indicators: Based on the overall organizational strategy and strategic plan, guide development of program strategy and indicators.
- Strategy Implementation: Guide the implementation of organizational and program strategy within Programs and Services.
- Systems Strategy: Investigate and implement system design changes (policies, processes, software) that enable the agency to focus on the Mission.

### Essential Responsibilities

- Work with leadership and team to develop agency strategies, policies, and practices for best management practices and to ensure compliance with regulatory requirements.
- Lead the development, implementation, and monitoring of financial policies and procedures for effective internal control over receipts and disbursements and correct allocation in the accounting system.
- Monitor the financial health of the agency and work with leadership team to develop and implement action plans to ensure the agency remains viable.
- Supervise financial operations and accounting staff in financial reporting, accounts payable, payroll, billing, and cash receipts.



- Provide coaching and professional development opportunities for accounting staff.
- Lead the development of the annual budget process.
- Lead proper financial analysis and financial reports for management and the Board of Directors.
- Provide staff support for Board of Directors, Finance & Investment, and Audit committees.
- Lead the work with government grantors as needed to obtain clarification of grant terms, timing of granting process, method and timing of billings, allowable expenses, and additional reporting as required.
- Ensure contract billing preparation and monitor accounts receivable for timely payment.
- Supervise the preparation of budgets and other grantor specific reports for grant proposals and final accounting for grantors to assist development efforts.
- Facilitate the annual audit process and draft the GAAP financial reports. Ensure no audit findings through compliance with internal control procedures and proper transaction recording and documentation.
- Administer 403b plan, which includes ensuring timely 5500 filing and audit.
- Ensure all quarterly and annual filings have been made. These include payroll tax returns and Bureau of Labor reports, 1099s, sales tax returns, annual 990, 199, and RRF-1, welfare exemptions, business property tax returns, and business licenses.

### **Culture of Philanthropy**

A culture of philanthropy is where each person in the organization serves as an ambassador by promoting the organization's mission and giving to the agency. The CFO is an ambassador for the agency through his/her cultivation efforts in the community working with various community leaders, other agencies, foundations, and donors.

### **Success Metrics**

- Creation of a fully functional and strategic Finance & Accounting department that fosters collaborative relationships with programs, the Board of Directors, and funders.
- Finance & Accounting department demonstrates excellent customer service orientation in all of its transactions with internal and external partners.
- Policies and procedures are well thought out and implemented in a consistent manner.
- Communication with Finance & Accounting staff is conducted regularly and consistently. Programs and other departments are apprised of key Finance & Accounting changes in procedures, system implementation, or other key projects that have impact on workflow or work processes.

## Agency Culture

The business and social environment we operate in today has changed. What worked yesterday may not work today and will likely not work tomorrow. To thrive, we must incorporate new ways of thinking and embrace new practices. As part of our individual and agency cultural change process, it is critical that all employees of Catholic Charities aspire to the following:

- A commitment to the agency's mission, vision, and values.
- A commitment to excellence in everything we do.
- A commitment to accreditation as well as performance and quality improvement.
- A commitment to outcomes and measured results.
- A commitment to innovation and to what is possible.

## Qualifications & Requirements:

- Bachelor of Science in Accounting; MBA a plus.
- 10 years of accounting experience, 5 years of nonprofit management preferred.
- At least five years' experience as Director of Accounting or equivalent, with a budget of at least \$10 million.
- 5 years supervisory experience.
- Strong analytical skills.
- Ability to work independently and under tight deadlines.
- Ability to work with leadership and management in a professional manner.
- Proficient in Microsoft Office, Excel, Word, Fund accounting software, preferably Sage MIP.
- Responsive to the needs of both internal and external parties.
- Ability to communicate effectively both orally and in writing.
- Technologically savvy, with an ability to point to examples of having worked with IT staff to develop and implement new processes and systems that increased efficiency.
- Flexible and a self-starter; able to multi-task while also being highly detail-oriented.
- Excellent people skills with experience collaborating in a multi-disciplinary, diverse, and dynamic team.
- Personal qualities of integrity, credibility, and a commitment to Catholic Charities' mission.
- Proven leadership skills.

## Core Competencies:

- Highly effective leadership; demonstrates a fundamental respect for the dignity of others. Works collegially and is a proven team builder. Inclined to coach and teach in order to improve knowledge and ability of others but holds people accountable for results.
- An innovator, capable of creating or seizing opportunities to improve service effectiveness, client outcomes and building strategic partnerships with other organizations.
- Understands and values quality improvement; applies managerial and technical skills to measure and improve efficiency and effectiveness and ensure compliance with all regulatory and contractual obligations. Able to effectively address overlapping projects and deadlines. Adaptable and reliable in face of conflict, crisis, or changing priorities.
- Able to lead a team in managing multiple and often simultaneous tasks. As well as creating a work environment recognized for a high level of organization, timeliness, cost effectiveness, accuracy, and results.
- A demonstrated commitment to diversity and inclusion; valuing a diversity of perspectives and encouraging contributions by all team members.
- Politically astute and tactful; attentive to the perspectives and competing interests of various internal and external stakeholders.
- Ability to thrive in a flexible, fast-paced, accredited, and growth-oriented environment while maintaining a positive, solution-oriented approach.
- Excellent analytical, correlation, reasoning, and problem-solving skills.
- Aptitude for data mining and report generation.

**Salary:** Commensurate with background and experience. Comprehensive benefit program (details will be furnished to finalist candidates).

**Application Deadline:** May 1, 2025

*(We reserve the right to shorten the deadline for applications if we have sufficient interest. Please apply early to ensure your background will be considered.)*

**For consideration, please email resume to:**

Brent Morton  
Senior Vice President of Recruiting  
Catholic Recruiter Associates  
[Brent@CatholicRecruiter.com](mailto:Brent@CatholicRecruiter.com)

**Note:** Only those selected for an interview with the search committee will be contacted.

Search managed by:

CATHOLIC RECRUITER ASSOCIATES

EXECUTIVE SEARCH • MANAGEMENT CONSULTING

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