



- I. **Job Title:** Vice President Finance/CFO
- II. **Job Relationships:** The VP Finance/CFO reports to the President/CEO and leads the finance team comprised of a Controller, a staff accountant, and a financial assistant. The position directly supervises the Controller, who, in turn directly supervises the staff accountant and financial assistant. The position is a part of Lacasa's C-suite, along with the President/CEO and Chief Impact Officer, and is a member of Lacasa's senior leadership team comprised of the C-suite and Vice Presidents. The position is a member of the Real Estate Committee, comprised of the President/CEO, VP Real Estate Development, VP Asset Management, and Controller.
- III. **General Description:** The VP Finance/CFO is responsible for assuring the overall financial integrity of Lacasa and its subsidiaries. Develop financial planning and management capabilities to assure timely, accurate and transparent financial accounting and reporting. Develop and manage financial structures to facilitate general operations as well as real estate development, lending and/or other program/project operations. Develop and execute comprehensive risk and asset management strategies.
- IV. **Accountabilities**
  - A. Financial management
    1. Develop and maintain effective financial accounting/payroll systems to meet internal/external financial reporting and compliance requirements.
    2. Develop and execute operational and project financial analysis to assess performance versus plan.
    3. Develop effective cash forecasting and management processes to meet short and long-term working capital needs.
    4. Facilitate short/long-range financial planning to support the annual operating budget and periodic strategic planning.
    5. Develop grant tracking and compliance systems to meet grant application, performance and monitoring requirements and to ensure compliance with all grant terms and conditions.
  - B. Financial structures

1. Establish and maintain deposit, disbursement and investment accounts necessary to support business requirements.
2. Establish and maintain financial partnerships (including donors, financial institutions, private and public grant agencies and limited equity partners) to ensure availability of financing to support business requirements including asset-based, project-based and operational borrowing/investments.
3. Assess and advise leadership on the financial feasibility and design of financial structures for real estate development projects and social enterprise ventures.
4. Own financial analysis and projections for all real estate development projects.

C. Risk and asset management

1. Develop comprehensive risk management strategy to ensure security of financial and physical assets, performance of fiduciary responsibilities and protection against 3<sup>rd</sup> party liability.
2. Develop and manage system of internal controls to safeguard assets including the use of tiered financial approval levels and multiple review requirements.
3. Develop and maintain document retention and destruction processes including both paper and electronic files.
4. Identify insurable risks and maintain adequate insurance coverage to address property, liability and fiduciary needs.
5. Identify uninsurable risks and develop appropriate preventative and safety measures.

D. Other

1. Represent Lacasa leadership in strategic planning process, staff meetings, annual meeting and other community events.
2. Facilitate regular Board review and analysis of financial results, proposing appropriate action when indicated. Serve as primary staff to the Finance Committee of the Board.
3. Participate in community and professional meetings and training events as directed by supervisor.
4. Within the first year, achieve industry real estate development financial certification.
5. Perform other duties as assigned by supervisor.

**V. Job Qualifications**

- A. Undergraduate degree in accounting and CPA certification or history of work experience with equivalent responsibility.
- B. Eight to ten years of experience in accounting, financial planning and management with a preference for not-for-profit experience.

- C. Excellent computer skills and preference for experience with MIP accounting software.
- D. Demonstrated ability to communicate financial issues to non-financial constituents.
- E. Demonstrated ability to both work in and lead teams.
- F. Strong interpersonal skills.
- G. Share's Lacasa's purpose and core values. Purpose – to equip people and communities to unlock their potential. Values – Respect human dignity, work together, pursue excellence and build to last.

**VI. Hours and Salary Range**

- A. Full-time exempt.
- B. Salary will be established commensurate with the skills and experience of the employee within the appropriate wage band.

6/14/21