



## Chief Financial Officer

### **ABOUT OUT & EQUAL WORKPLACE ADVOCATES**

Out & Equal is committed to ending employment discrimination for lesbian, gay, bisexual, and transgender employees. We believe that people should be judged by the work they do, not by their sexual orientation or gender identity. Every day, we work to protect and empower employees to be productive and successful—so they can support themselves, their families, and contribute to achieve a world free of discrimination. For more information, visit our website at [www.outandequal.org](http://www.outandequal.org).

Position: Chief Financial Officer

Target start date: February 2012

### **SUMMARY**

The Chief Financial Officer is a new position, being created to support the strategic growth of Out & Equal as the organization increases in size, expands its programming and infrastructure to operate globally, and invests in an integrated, more sophisticated technology platform for delivering resources and engaging constituents. The Chief Financial Officer – with a small staff of employees and partners -- will be responsible for the development and hands-on implementation of strategies that will provide the organization with the infrastructure and processes it requires to operate efficiently and within risk management parameters. The Chief Financial Officer will oversee financial and technology processes, analyzing and managing the legal, compliance, audit, banking, accounting, technology and vendor contract requirements of the organization. The Chief Financial Officer will serve as the primary staff liaison to the Finance Committee of the Board of Directors.

### **ACCOUNTABILITY**

Chief Financial Officer is a full-time, exempt position. This individual works under general supervision with minimal instruction, reporting to the Deputy Director. Performance at this level requires knowledge of organizational and departmental policies and procedures and the ability to analyze and choose among a number of alternatives in solving both routine and unusual problems.

### **RESPONSIBILITIES**

#### **Accounting and Finance**

1. Manage the complete financial planning, analysis and reporting for the organization, including the creation of long- term financial plans to support Out & Equal's strategic goals. Develop and monitor budgets, oversee timely and accurate monthly financial reporting for both internal and external purposes, create regular forecasts, and provide in depth analysis of historic and prospective performance.
2. Create and maintain effective internal controls to assure safeguarding of assets and reliability of financial statements. This includes updating operating procedures for all accounting and financial controls to ensure resources are strategically leveraged to support Out & Equals mission. Maintain effective communication with department managers to focus on revenue attainment and cost controls.

3. Manage external financial relationships with banks, accountants, insurance providers, and auditors ensuring an appropriate financial infrastructure and support system that supports the organization's expanding global requirements and that are operationally secure and cost effective.
4. Serve as the liaison to the Finance and Audit Committees of the Out & Equal Board of Directors.
5. Serve as the financial liaison for Out & Equal's regional affiliates. Ensure effective controls are in place and monitor each affiliate's budget.
6. Oversee the accurate and confidential administration of the organization's human resources function including payroll, benefits, and retirement plans, working with the Senior Director to recommend and implement changes that best serve the overall needs and strategies of the organization.

### **Legal and Compliance**

1. Manage the legal structure, documentation, compliance and reporting requirements for Out & Equal as a 501(c)3 organization (including any subsidiary structures) to facilitate and protect execution of the organization's mission globally. This could include, but not be limited to, establishing entities and licenses for operating in multiple states and/or countries.
2. Oversee Out & Equal's relationships with legal advisors - both *pro bono* and contracted as required.
3. Oversee the execution and management of all contracts and procurement in accordance with internal policies and relevant laws and regulations.

### **Technology**

1. Provide guidance in the development and implementation of Out & Equal's overall technology strategy, including IT infrastructure including outsourced services and database management.
2. Provide guidance regarding the management of the relationships with IT service providers, hardware and software vendors, managing contracts, procurement and licensing.
3. Provide guidance regarding continuous availability and reliable functioning of the organization's technology infrastructure, proactively planning for upgrades, data protection, system redundancy and related processes necessary for the ongoing operations of the organization.

### **Operations**

1. Develop, maintain, communicate and oversee compliance of Out & Equal's internal operating procedures as approved by the Board of Directors.
2. Develop and implement an ongoing facility management plan for the organization, including multi-site and/or virtual work site strategies as might be suggested by Out & Equal's strategic plan.
3. Contract on behalf of the organization with outside vendors and organizations to obtain equipment and services required to support operational activities.

## INDIVIDUAL QUALITIES

- **Social and cultural competence:** able to work with many different people and personalities from diverse backgrounds with ease
- **Highly organized:** able to successfully manage many projects with multiple moving parts: multi-tasking is the name of the game
- **Strategic and focused:** able to articulate strategic vision and doesn't lose sight of the big picture while many interruptions and tasks step in
- **Diplomatic:** able to get to a solution with multiple stakeholders while maintaining good relationships, and getting desired results
- **Strong influencer:** able to get everyone moving in the right direction, even when you can't exercise direct authority
- **Incredible communicator:** knows how to present ideas and information in a way that maximizes being heard – whether written, on the telephone, in groups or one-on-one
- **Teamwork:** ability to work effectively with colleagues and volunteers yet able to take the projects on with minimal supervision
- **Tech-Savvy:** comfort with online platforms and social media
- **Smart and interesting:** able to catch on to ideas quickly, and run with them in interesting directions
- **Fast-paced:** ready to keep up with a fast pace, yet doesn't lose accuracy in the small details
- **Professional:** knows how to act in a professional setting that sets the tone for others
- **Fun:** finding that balance between being professional and having a great sense of humor helps keep everyone engaged
- **Committed:** passion for the mission of Out & Equal

## QUALIFICATIONS

- Education: an advanced professional degree in finance, accounting or law preferred, or significant relevant experience
- Professional credentials: CPA
- 10+ years of comprehensive experience working with increased responsibilities in finance and accounting, strong experience with contract review and management, and familiarity with nonprofit finance and compliance requirements

- Experience with international transactions and operations needed
- Strong project management skills, preferably with IT implementation projects
- Experience with and understanding of corporate workplaces and cultures
- Experience with and understanding of non-profit, mission-based advocacy (a clear knowledge of lesbian, gay, bisexual and transgender issues a definite plus)
- Strong skill with Microsoft Excel, Word and PowerPoint; experience with social media and website management both considered a plus

### **PHYSICAL ACTIVITY REQUIREMENTS**

This position requires frequent computer use and the occasional lifting of up to 50 pounds. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **LOCATION AND COMPENSATION**

Ideally, the successful candidate will be located in San Francisco. As a public charity, Out & Equal is only able to provide very minimal financial assistance for relocation. Having the position based in a location other than San Francisco would be possible for the right candidate and circumstances.

Out & Equal offers competitive salary and benefits based on experience and roles.

### **TO APPLY**

Send resume with cover letter and compensation requirements. Include the position to which you are applying (in subject line) to Pamela Berkowitz at [PBerkowitz@OutandEqual.org](mailto:PBerkowitz@OutandEqual.org) or fax to Out & Equal Workplace Advocates, FAX (415) 694-6530. NO PHONE CALLS, PLEASE.

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