

Position Profile
Chief Financial Officer
Self-Help Enterprises (SHE)
Visalia, CA



Self-Help Enterprises (SHE) seeks an experienced and strategically-minded Chief Financial Officer (CFO) to oversee a complex portfolio of business operations and financial resources at the region’s premier community development and rural housing organization, building on the growth and recent expansion of its critical services to hundreds of families throughout an eight-county service area from Modesto to Bakersfield.

The Organization

Self-Help Enterprises (SHE) is a nationally recognized community development organization whose mission is to work together to build and sustain healthy homes and communities. SHE’s efforts encompass a range of programs, including mutual self-help housing, sewer and water development, housing rehabilitation, multifamily rental housing, and homebuyer programs in the San Joaquin Valley. Since 1965, SHE has helped more than 6,400 families build their own homes, rehabilitated over 6,800 unsafe homes, developed over 2,000 units of affordable rental housing, and has provided technical assistance for reliable access to safe drinking water and sanitary sewer infrastructures to more than 160 small communities. During this period of significant growth there are nearly 1,400 units in development, including 200 units for farmworkers and their families and 380 units for formerly homeless individuals for permanent supportive housing.

The concept of “self-help” is based on the conviction that, given the proper tools, individuals can and will do what is necessary to improve their own living conditions. This concept is a driving force in all aspects of the organization. SHE provides technical services and support, helping Valley families and communities compete for scarce financial resources and empowering people to be leaders in their communities. SHE’s combined efforts have touched the lives of more than 60,000 low income families in the eight counties of the Valley and have served as a model for similar organizations around the world.

SHE advances its work through the following programs:

- **Community Development:** Assistance for rural communities to identify sources of clean drinking water and develop sanitary sewer systems.
- **Mutual Self-Help Housing:** With skilled onsite supervision, families help build each other’s homes.
- **Rental Housing:** Affordable rental housing communities offer quality resident services programs.
- **Housing Rehabilitation:** Funding assistance to help families make important health and safety repairs.
- **Gateway Homeownership Education:** Guidance for families through budgeting and financial fitness on the path to homeownership.
- **First-Time Homebuyer:** Resources and assistance for families wishing to become homeowners through traditional avenues.

- **Emergency Services:** Direct assistance to households and communities dealing with drought, wildfires, water access, and more.

SHE is governed by a diverse 16-member Board of Directors from across its eight-county service area. The organization's current operating budget is more than \$16 million, which is comprised mainly of government grants, real estate developer fees, and program services income, in addition to contributions and investments. With a current staff of nearly 150, SHE is a NeighborWorks affiliate, a longstanding Rural LISC Community Development Corporation, and a new member of the Housing Partnership Network (HPN). For more information about Self-Help Enterprises, please visit <https://www.selfhelpenterprises.org/>.

The Position

Reporting to the Chief Executive Officer (CEO), the Chief Financial Officer (CFO) is an integral leadership team member responsible for the financial oversight and strategic positioning of SHE's impressive and complex housing portfolio and slate of programs designed to advance the development, improvement, and preservation of housing opportunities, as well as address vital infrastructure needs for rural families across its eight-county service area. The CFO will partner with the Executive Team and the Board of Directors to support planning for the ongoing strategic advancement and sustainability of the organization, oversee all compliance for government (federal and state) contracts and private grants, safeguard the assets of the organization, directly supervise a five-person finance team, and work in partnership with a variety of teams across the organization.

Key Responsibilities

With the departure of a long-tenured CFO and the exponential growth of the organization over the past seven years, the CFO will perform a key role in advancing the organization's future position in the region and serve as a vital strategic partner alongside the CEO and the Executive Team. The CFO will:

Finance Management

- Lead the implementation of multi-fund accounting practices and procedures for all programs and services including the oversight of 100+ funding sources and multiple affiliate organizations with limited partnership structures and LLC agreements.
- Manage cash flow planning and utilize strategic, proactive, ongoing projections to anticipate cash needs and ensure availability of funds when needed.
- Ensure proper oversight of cash and investment accounts
- Book complicated real estate transactions, sponsor loans, philanthropic investments, and GP equity along with different types of contributions, applying a strategic lens to support decision making.
- Oversee and evaluate financing strategies and related activities as well as banking relationships to optimize their return on investment.
- Develop and prepare various finance reports for program staff and Board of Directors
- Prepare all financial statements and necessary financials for year-end audits.

Strategy, Policy, and Planning

- Provide comprehensive strategic planning and oversight across all financial matters, working in collaboration with the CEO and Executive Team.
- Coordinate the development and continued monitoring of budgets, working in close partnership with department leaders.
- Develop detailed and comprehensive financial business plans and forecasts.

- Participate in corporate policy development as an integral member of the Executive Team.
- Represent the organization to financial partners including financial institutions, investors, foundations, funders, auditors, and public officials.
- Remain current with nonprofit audit best practices and state and federal law regarding nonprofit operations.
- Develop and utilize effective strategic analysis tools to provide insight into the organization's current and future operational and business plans.

Accounting, Supervision, and Staff Administration

- Direct the output of the finance staff and work collaboratively with team members to ensure proper maintenance of all accounting systems and functions.
- Supervise, mentor, and develop the talents of the finance team, with respect to the organization's strategic priorities.
- Ensure the integrity of appropriate internal controls and maintain high standards with respect to financial procedures.
- Collaborate with the finance team as well as others throughout the organization to ensure efficiency standards in a manner that demonstrates respect and consideration for the input of others and ensures organizational financial health.
- Assure the accuracy and usefulness of financial and management reporting for federal and state funders, foundations, and SHE's board of directors; oversee the preparation and communication of monthly and annual financial statements.
- Coordinate audits and the accurate and timely filing of tax returns.
- Ensure legal and regulatory compliance regarding all financial functions.
- Manage integration between financial systems and information for SHE programs through responsive, accurate, and meaningful internal financial reporting.

Skills and Expertise

Ideal candidates for this position will share a commitment SHE's mission and values and will bring a variety of experiences and attributes to SHE, including:

- At least seven years of experience as CFO or equivalent in an organization of similar size and scope of Self-Help Enterprises and that includes an organizational structure with multiple limited partnerships, affiliates, and LLCs.
- Experience in a senior financial management role, working with executive staff, resulting in the development and implementation of creative financial management strategies, as an auditor of large non-profit organizations and/or construction companies, or related experience.
- A deep background in nonprofit accounting including sophisticated fund and grant accounting, compliance, and tax reporting.
- Experience working with information technology staff to manage finance and accounting software packages.
- Excellent written and oral communication skills including the ability to communicate technical financial information to non-financial individuals.
- Experience with land development, construction, and/or real estate finance is highly desirable as is knowledge of affordable housing finance sources, such as Low Income Housing Tax Credits.
- Proficient use of Excel spreadsheets and sophisticated accounting software. SHE uses MIP Fund Accounting, PEO – Insperity for payroll, and Certify for mileage reimbursement.

Qualities and Attributes

- Demonstrated leadership ability, team management, and interpersonal skills both inside the organization and with external partners.

- A natural, open, and generous collaborative style, with the ability to engage and motivate a team to meet deadlines and strategic goals.
- Comfort with a fast-paced working environment with multiple competing deadlines.
- Excellent analytical and abstract reasoning and organizational skills.
- Demonstrated commitment to the mission and values of SHE.
- The ability to relate well to persons and groups of diverse social and economic backgrounds and a sensitivity to issues related to diversity, equity, and inclusion in the workplace.
- Minimum of a bachelor's degree in business administration or related field; MBA or related advanced degree preferred.
- CPA professional accreditation required.

This position will involve moderate travel throughout the eight-county service area. There is the possibility for a hybrid working arrangement, however the requirement is that this position be available and in-person the majority of their time to the finance team and Executive Team in the Visalia office. The salary range has been set at \$145-175K. SHE offers a generous package of health coverage and employee benefits.

Application Process

To apply, upload resume, cover letter, and salary requirements by [clicking here](#). For other inquiries, contact Suzanne Tan at Suzanne.tan@marcumllp.com. Resume review begins immediately.

Self-Help Enterprises is an Equal Opportunity Employer that does not discriminate on the basis of actual or perceived race, color, national origin, ancestry, sex, gender, gender identity, pregnancy, childbirth or related medical condition, religious creed, physical disability, mental disability, age, medical condition (cancer), marital status, veteran status, sexual orientation, genetic information or any other characteristic protected by federal, state or local law. Our management team is dedicated to this policy with respect to recruitment, hiring, placement, promotion, transfer, training, compensation, benefits, employee activities and general treatment during employment.

About Marcum's Nonprofit & Social Sector Group

Marcum's Nonprofit & Social Sector Group is working with SHE to advance the search. Our group is a mission-driven professional services firm seeking to do more for nonprofits and socially conscious organizations. Learn more about our work at <http://marcumllp.com/industries/nonprofit-social-sector>.