POSITION DESCRIPTION

POSITION TITLE: Chief Financial Officer

REPORTS TO: Executive Director

FLSA: Full-time, Exempt

ABOUT THE S. MARK TAPER FOUNDATION
The S. Mark Taper Foundation is a responsive grantmaker funding Southern California nonprofit organizations working in the arts, education, health, social services, and environmental issues. The Foundation has an operating budget of approximately $1.9 million, an annual grant payout of approximately $7.0 million and an investment portfolio of approximately $170 million.

SUMMARY
The Chief Financial Officer (CFO) is responsible for the management, reporting and record-keeping of the financial activities of the Foundation. This position will supervise an experienced Bookkeeper and report to the Executive Director.

SPECIFIC DUTIES AND RESPONSIBILITIES

- Accounting: Supervise maintenance of general ledger. Supervise use of investment tracking software. Review and approve account reconciliations for investment and checking accounts. Help resolve any issues with investment tracking software, money managers or investment custodians.
- Audit: Prepare year-end financial statements and related footnote disclosures. Prepare supporting materials for, and coordinate the Foundation’s annual financial audit by, an outside independent auditor. Prepare additional financial reports as requested by Executive Director and Foundation’s Board.
- Payroll: Process payroll through an outside service. Maintain payroll records. Respond to employee inquiries. Process contributions to retirement plan and maintain plan records. Ensure compliance with all plan communication requirements.
- Tax and compliance: Prepare quarterly excise tax estimates for review and approval and make appropriate deposits. Prepare annual Federal and State tax filings. Respond to correspondence from taxing authorities. Monitor Foundation’s compliance with tax and other regulations.
- Insurance and occupancy: Act as primary contact with insurance agents for all insurance-related matters. Review all renewing policies for continued suitability for Foundation needs. Review preparation of insurance-related questionnaires and forms. Work with brokers or carriers to secure new coverage when needed. Liaise with landlord for all tenant-related matters, including negotiation of new lease upon expiration of lease term.
- Personnel issues: Ensure Foundation staff compliance with current Foundation employment policies. Respond to employee questions regarding employment policies. Help resolve employee personnel/human resources issues. Work with Executive Director on onboarding/exit processes and on identifying employment policies that need updating or improvement. Maintain employee handbook.
- Systems and equipment: Act as primary contact for outside IT consultants and vendors. Perform ongoing needs assessment and manage expansion/upgrade/acquisition projects. Troubleshoot minor issues.
- Other: Assess legal documents and contracts, as needed.
• Provide support to grants staff, including financial analysis as needed.
• Represent the Foundation at external meetings, opening events and activities, as needed.
• Supervise accounting staff.
• Other duties, as assigned.
• Participate in professional development opportunities.

KNOWLEDGE & SKILLS
The successful candidate for the position will have progressively responsible accounting experience, a knowledge of the nonprofit sector in Southern California, and a strong desire to work with and support the Foundation and its grantees. The Foundation seeks an experienced professional with the following qualifications:
• Minimum of 5-7 years of paid, full-time experience in accounting
• Knowledge of Generally Accepted Accounting Principles and tax code relevant to nonprofit organizations
• Investment experience or training
• Experience in designing investment recommendations, presenting them to a board and implementing them
• Investment software experience preferred
• Computer skills, including accounting software and Microsoft Office
• High level of attention to detail and accuracy
• Strong analytical and critical thinking skills
• Strong written and verbal communication skills
• Ability to take initiative, problem solve, and exercise good judgment
• Strong interpersonal skills and an ability to develop and maintain productive work relationships
• Ability to interact with all persons, inside and outside the Foundation, in a professional, courteous, and tactful manner
• Ability to discern and handle sensitive matters with discretion, confidentiality, and tact
• Understanding of the vision, mission, and values established by the Board of Trustees
• Professional demeanor, dependability, and integrity
• Flexibility and comfort with a certain level of ambiguity
• Ability to welcome feedback as a means to professional growth

EDUCATION & EXPERIENCE
• Bachelor’s degree, preferably in accounting, finance or a related field
• CPA license in active status required
• Advanced degree preferred
• Minimum of 5-7 years of paid, full-time progressively responsible experience in accounting
• Experience with a foundation or nonprofit organization is preferred

PHYSICAL REQUIREMENTS
• Work at a desk and computer for a full workday, and up to 2 to 3 hours at a time
• Lift and move documents and supplies up to 25 pounds
• Bend to file or retrieve documents
• Communicate effectively in speech and in writing
• Read and understand complex written documents, financial documents and written and verbal communications
• Occasionally work extended hours (early and late), and weekends

EQUAL EMPLOYMENT OPPORTUNITY
The Foundation is committed to equal employment opportunity for all employees and applicants. In accordance with applicable laws, discrimination and harassment are prohibited on the basis of sex, gender, pregnancy, gender identity or expression, sexual orientation, race, color, religion, creed, national origin, ancestry, age, marital status, military or veteran status, physical or mental disability, medical condition, genetic information, or any other characteristic
protected by law. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, leaves of absence, compensation and training.

APPLICANTS WITH DISABILITIES
Reasonable accommodation will be made so that qualified applicants with disabilities may participate in the application process. Please advise in writing of any special needs at the time of application.

COMPENSATION & BENEFITS
Strongly competitive salary commensurate with qualifications and experience, plus benefits including 100% employer-covered medical insurance. This is a full-time, exempt position located in Brentwood (West Los Angeles), California. This position is not a hybrid position and requires an in-office presence, with occasional work from home days. The Foundation will not provide relocation benefits.

TO APPLY
Send resume and cover letter by email with the subject line “Chief Financial Officer Position” to Adrienne Wittenberg, Executive Director at: adrienne@smtfoundation.org Please no phone calls to the Foundation.