



POSITION DESCRIPTION

Position Title: **Chief Financial Officer (CFO)**
Candidate: TBD
Department: Finance
Supervisor: CEO
FLSA: Full-Time/Hourly/Exempt
Salary Range: \$240-245K
Effective Date: August 2025

OUR IMPACT

For over 50 years, Samaritan House has been leading the fight against poverty in San Mateo County. We're the only organization that delivers the full breadth of essential services and personalized support to the working poor. By ensuring our clients are fed, clothed, healthy, and housed, we help them create their own stability and remain an active, successful part of our community. After all, an enduring community is only possible when every person has the resources they need to live.

OUR CULTURE

We're passionate about providing our employees with a supportive work environment and experiences that help them grow. We offer excellent opportunities for individuals with proven strong, creative, results-driven leadership skills and stellar work ethics. We welcome candidates who love working with people of diverse backgrounds and want to make a difference by fostering community care for our neighbors in need.

YOUR IMPACT

Samaritan House is a dynamic nonprofit committed to Fighting Poverty and Lifting Lives. With a \$39 million annual budget, we are seeking a strategic and experienced Chief Financial Officer (CFO) to lead our financial operations and risk management efforts. This high-impact role ensures the organization's financial integrity and sustainability while maintaining visibility with external partners and our Board of Directors.

Reporting to the CEO, the CFO will be a key partner in aligning financial strategy with Agency's long-term goals (Destination 2030 Plan). As a member of the C-Suite Team, the CFO will oversee all fiscal operations, risk management, financial planning, reporting, and compliance, while supporting fiduciary responsibilities in collaboration with the Board and its Finance, Investment, and Audit Committees.

The CFO will lead a mid-sized finance team of seven including the Controller, Payroll, Accounting Managers, Financial Analyst, and Specialists—and work closely with internal and external stakeholders to manage various diverse funding streams, including grants, government funds, and donations. Including but not limited to, the CFO will provide leadership to the Finance, Audit, Investment, and is a liaison to Strategic Planning Committee and Advisory Council.

JOB QUALIFICATIONS

Please note our preferred and in some cases required qualifications for this position are noted. In some cases, long term proven experience may substitute for education.

EDUCATION:

- Bachelor's degree in Accounting, Finance, Business Administration, or a related field (Master's degree or CPA a plus).

EXPERIENCE minimum 8 years:

- Proven experience in budgeting, financial analysis, and strategic financial planning.
- Strong understanding and experience with risk management principles and practices.

- Experience working closely and successfully with Board of Directors and/or committees, especially in a nonprofit environment.
- Experienced and highly proficient in financial software (e.g. NetSuite, Sage Intacct or equivalent) and Microsoft Office Suite, Microsoft 365.
- Minimum of 8 years of progressively responsible financial management experience, with at least 5 years in an executive level leadership role.
- Strong commitment to process improvement and automation.
- Experience managing a medium-sized finance teams, with a focus on developing and mentoring staff.
- Strong knowledge of nonprofit financial operations, fund accounting, compliance, accounting principles, audit, tax preparation, and regulatory requirements, including experience with grants, government funding, and use of restricted funds.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Excellent communication and presentation skills, with the ability to explain complex financial concepts to non-financial stakeholders.
- Commitment to the mission of the organization and a passion for nonprofit work.
- Excellent collaborative management and interpersonal skills
- Excellent organizational and time management skills. Ability to multi-task with ease and prioritize effectively. Excellent ability to work within and meet deadlines.
- Excellent Computer Proficiency is required with Microsoft Office Suite, ability to quickly learn new database systems (i.e., Salesforce, Sage Intacct, and 3rd party applications related to financial reporting)
- Excellent data management skills. Must be able to successfully manage and maintain accurate data and reports; audit and ensure integrity of information. Strong ability to conduct all business and interactions with all constituents in a highly ethical manner, demonstrating high level of integrity as well as the ability to maintain appropriate professional boundaries.
- Must be able to exercise appropriate and sound judgment, professionalism, appropriate composure with tact and diplomacy both under normal and stressful situations.
- Must possess a solutions-based approach to problem solving. Ability lead creatively and show initiative and act as an independent employee while having a team player approach and attitude in all interactions.
- Excellent interpersonal skills. Ability to establish and maintain successful, collaborative and effective relationships with Samaritan House constituents (internal and external) and partnering agencies while maintaining all fiscal and risk controls in place.
- Must have flexibility with work schedule, which may include occasional evenings, holidays and/or weekends as needed
- Ability to drive to other Agency or partner locations -must have dependable transportation with insurance, and an excellent driving record

PHYSICAL REQUIREMENTS AND BACKGROUND CHECK

Candidate must have the physical, visual, and auditory ability to perform the essential functions of the job and to respond to emergencies with or without reasonable accommodations. Reference checks and background checks will be performed prior to and at commencement of employment. Candidate must be able to work in a busy office environment with occasional-to-regular interruptions. Activities may include but are not limited to: repetitive hand/arm motion (computer work), extended periods of standing and/or sitting at a computer workstation, regular travel, occasional bending, pulling, pushing, reaching, lifting, and carrying up to 20 pounds. This position will require the usage of a mobile device or other assigned equipment, which will be provided. Position is generally onsite with flexibility for remote hybrid and occasional travel to partner agencies or program sites. Traditional business schedule unless Audit or Budgeting season requires different schedule.

ESSENTIAL FUNCTIONS OF THE JOB

Key Responsibilities include but not limited to:

1. Fiscal Operations Management:

- Lead and manage all financial operations of the organization, including accounting, budgeting, forecasting, payroll, accounts payable/receivable, and cash flow management.
- Supervise and mentor the finance team, providing day-to-day guidance, support, and leadership.
- Collaborate with Leadership for Human Resources, Volunteerism, Advancement, Programmatic needs.
- Ensure the timely and accurate preparation of financial reports, statements, and forecasts.

- Develop and implement financial strategies aligned with the organization's mission and long-term goals Prepare and present financial reports and analyses to the CEO and Board of Directors, offering strategic insights and recommendations.
 - Ensure compliance with all regulatory and financial reporting requirements, including audits, tax filings, fund restrictions and other statutory obligations.
 - Manage relationships with external financial partners, including auditors, banks, county, funders and other service providers.
- 2. Budget Development, Forecasting and Oversight:**
- Lead the annual budgeting process in collaboration with C-Suite, Executive leadership and program directors, ensuring alignment with organizational goals and priorities.
 - General experience with IT, capital and facility budgeting.
 - Develop and maintain realistic, achievable, sustainable budgets by working closely with key stakeholders across departments.
 - Monitor and analyze financial performance against the approved budget, providing regular updates and insights to the CEO, Finance Committee, and Board of Directors.
 - Create and maintain financial forecasting models to support long-term strategic planning and informed proactive decision-making.
- 3. Grant and Fund Management:**
- Oversee the financial management of grants, government funds, and individual donations.
 - Ensure compliance with grant terms, government regulations, and donor requirements.
 - Monitor systems for tracking and reporting on the usage of restricted funds for compliance.
 - Collaborate and work closely with Advancement on proposals and resource development.
- 4. Risk Management:**
- Implement and oversee risk management strategies to protect the financial health of the organization.
 - Act as liaison with outside legal assistance (paid and pro bono) when needed.
 - Develop and monitor financial controls to safeguard assets and ensure compliance with legal, regulatory, and ethical standards.
 - Lead the organization's insurance, auditing, and financial compliance efforts.
- 5. Community and Board Committee Liaison:**
- Maintain and Develop relationships with key community stakeholders to include but be limited to County, Municipal, Funders and Individual Donors.
 - Serve as the primary financial liaison to the Finance Committee, Audit Committee, Investment Committee, and Strategic Planning Committee. Ensure committee members are informed and engaged.
 - Provide detailed financial reports, analysis, and recommendations to the Board of Directors and Committees.
 - Support the Audit Committee in managing the annual audit process
- 6. Financial Reporting and Strategic Planning:**
- Provide clear, concise, and actionable financial reporting to the CEO, Board of Directors, and leadership teams.
 - Contribute to long-term strategic planning by providing financial insights, analysis, and recommendations.
 - Participate in the development of financial strategies to ensure the sustainability and growth of the organization.
- 7. Team and Agency Leadership, C-Suite:**
- Be a contributing member of the C-Suite team. Provide advisory and strategic input relating to all areas and issues of the organization as needed by the team. Think strategically, adapt, and identify solutions.
 - Have a high degree of social and emotional intelligence to work alongside CEO and COO on organizational and sensitive matters.
 - Maintain an Advancement Portfolio.
 - Manage, mentor, and develop a high-performing finance team.

- Foster a culture of collaboration, continuous improvement, and professional growth within the finance department.
 - Ensure that the finance team operates with efficiency, accuracy, and a customer-service mindset.
 - Collaborate with agency leaders in ensuring controls and financial systems are in place and complied with in the overall management of secure financial processes.
 - Collaborate with Agency leaders as necessary in the management of department.
8. Attend internal and external training, events and meetings as needed.
 9. Perform all work and conduct all engagements with constituents within Agency policies and values. Represent the agency professionally and courteously internally and externally.
 10. Perform all function within agency DEIB standards, values and Cultural Sensitivity: Understand and respect the diverse backgrounds and needs of all constituents and ensure compassionate engagement and services are culturally sensitive and inclusive
 11. Report and complete any necessary incident reports immediately or within 24 hours, whichever is sooner. Review the incident with supervisor. Report on the job injuries immediately to HR.
 12. Other duties as assigned.

HOW TO APPLY

Interested candidates for this position will be required to submit a cover letter and resume to:

Robert Half International – Finance Division on behalf of
 SAMARITAN HOUSE Vice President of Human Resources
 4031 Pacific Blvd. San Mateo, CA 94403
 E-mail: jobs@samaritanhousesanmateo.org Via facsimile: (650) 294-4336

Samaritan House is an equal opportunity employer. Because of the volume of applications Samaritan House receives, we regret we are not able to respond to every applicant individually. If your skills and experience are a good match for this position, our recruitment firm will contact you for an interview.

ACKNOWLEDGMENT

Please sign below in acknowledgment that you have received and understand the job description of CFO

 Employee Signature

 Date

 CEO Signature

 Date

 Vice President of Human Resources

 Date