

SAGAMORE INSTITUTE

Job Description

Sagamore Institute builds and implements solutions to society's biggest problems. Through research, consulting, and impact investing, we fight for a society uplifted by heartland policy innovation, business solutions, and citizen engagement. To learn more, visit our website at <http://www.sagamoreinstitute.org>.

As an integral member of the management team, the Chief Financial Officer (CFO) is responsible for the development and implementation of Sagamore's financial management strategy in a way that builds credibility, trust, and transparency with internal and external stakeholders. The CFO ensures strong internal control systems and has direct responsibility for financial strategy, performance, and risk management. This position actively manages and participates in all financial functions, with direct responsibility for accounting, financial analysis, budgets, forecasts, payroll, technology and human resources.

Position Title: Chief Financial Officer

Reports To: President and Chief of Staff

Job Functions: The Chief Financial Officer is required to perform a range of duties, including;

Financial Management

- Manage cash flow, financial strategies and banking relationships
- Develop models for forecasting, business planning, and reporting
- Prepare financial statements, financial analysis and reports, and make strategic recommendations to ensure financial stability
- Remain current on nonprofit accounting and best practices and state and federal laws and regulations regarding nonprofit operations
- As a partner to the President, Chief of Staff, and management team, assess organizational performance against both the annual budget and the organization's strategic plan
- Develop tools and systems to provide critical financial and operational information to the management team and Board of Directors and make actionable recommendations on both financial and operations strategies.

Planning, Policy, and Stakeholder Relations

- Manage the budget and forecast processes to ensure annual operating plans align with the three-year business plan
- Review and analyze budgets in order to monitor progress and present financial metrics both internally and externally
- Engage the Finance Committee of the Board of Directors to guide development of financial plans and projections
- Represent the organization to stakeholders (financial institutions, donors, foundation executives, auditors, public officials, etc.)

Accounting and Administration

- Ensure maintenance of appropriate internal controls and financial procedures

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- Ensure timeliness, accuracy, and usefulness of financial and management reporting for all stakeholders including our internal program areas, the Finance Committee, the Board of Directors, our program participants, foundations and donors
- Coordinate audits and ensure accurate and timely filing of tax returns
- Ensure legal and regulatory compliance regarding all financial functions
- Serve as the organization's risk manager, including evaluating loss exposure and obtaining and maintaining appropriate insurance coverage
- Manage outsourced functions including payroll and human resources and technology

Leadership

- Assume responsibility for the overall success of the finance department in meeting or exceeding goals
- Provide coaching and leadership to finance department staff to ensure support of the mission of the organization and the professional growth of team members
- Share responsibility for the strategic integration of operational activities within and between finance and other areas of the organization
- Serve as a member of the management team and participate in organization-wide problem solving and decision making
- Provide insight, vision, and leadership to enable the organization to actualize opportunities that align with its mission and vision
- Utilize strong business judgment and financial acumen to strategically analyze the organization's internal strengths and weaknesses, and respond to external opportunities and threats

Job Qualifications and Requirements:

- Minimum Bachelor's Degree in Accounting, Business or Finance; CPA preferred
- Experience in a senior financial management role ideally with both external audit and in-house financial management experience gained in nonprofit, corporate, and/or entrepreneurial settings
- Experience in nonprofit accounting and management of complex financial systems but possess a willingness to be hands on with the accounting functions.
- Experience with Salesforce and MIP accounting software preferred
- Ability to operate in a flexible and entrepreneurial environment
- Demonstrated ability to think and act strategically
- Successful leader of new initiatives, change management, and culture shifts
- Experience directing and implementing new systems, processes, and technology to enhance internal operations and organizational effectiveness
- A track record of building, managing, and mentoring high-performing teams
- A commitment to excellence and continuous improvement
- Strong written and verbal communication skills including solid presentation skills
- Demonstrated ability to maintain productive relationships with diverse constituents including internal staff, board members, donors, vendors, strategic partners, legal counsel, bankers, auditors, and other professionals
- Personal qualities of integrity, credibility, and dedication to the mission of the organization

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Compensation and Benefits: Sagamore Institute offers a competitive compensation and benefits package including base salary, health, life, dental, and disability insurance benefits.

Application Process: Please visit www.SagamoreInstitute.org/Careers to submit a cover letter, resume, and salary requirements. Applications will be considered on a rolling basis.