



**Sonoma Land Trust  
Director of Finance & Administration/CFO  
Position Description**

***Painter Executive Search is supporting Sonoma Land Trust in its search for a collaborative, institution-building Director of Finance & Administration/CFO to lead the finance and administration functions and become a trusted partner in growing impact, achieving long-term sustainability and protecting the land of Sonoma County forever.***

Since its inception in 1976, Sonoma Land Trust (SLT) has protected scenic, natural, agricultural and open landscapes throughout Sonoma County for the future. Located north of San Francisco, Sonoma County is a million acres of diverse natural resources, fertile agricultural land, acclaimed wineries and small cities. Sonoma is one of the most bio-diverse counties in California with more than 55 miles of Pacific coastline, significant tidal wetlands, redwood forests and oak woodlands, unique geological regions, and productive valleys and waterways. In Sonoma County, it is all about the land. The land is the heart of the community--when the land is healthy, the community is healthy. An accredited land trust, SLT is dedicated to protecting views and valleys and the region's dynamic ecosystems—all of the natural infrastructure that keeps Sonoma County beautiful, wild and working. For over 40 years, Sonoma Land Trust has been working to ensure that the whole picture is healthy—including the wildlife and people who enjoy its beauty, benefit from its richness and depend upon its vitality, now and in the future.

**POSITION SUMMARY**

The Director of Finance & Administration/CFO (CFO) is responsible for a broad range of financial, administrative and operational duties that are essential to defining, implementing, and evaluating Sonoma Land Trust's mission. The CFO works closely with the Executive Director and as a member of the Senior Management Team to establish and supervise a comprehensive and effective system of financial management. Additionally, the CFO staffs the Finance, Investment and Audit committees of the Board and regularly informs the Board of the information required for organizational oversight.

The CFO is relied upon as a thought-leader and trusted ally in navigating the complex financial transactions and contracts required of SLT's land conservation and stewardship work. This work includes fee-title and easement transactions developed over time with multiple funding partners. For properties that are held in the SLT portfolio, there are long-term responsibilities with significant financial requirements to manage including on-going stewardship, property and building improvements, restoration and public access. The financial and organizational planning embedded in this role ensures SLT's ongoing work as well as the sustainability of the organization and its capacity to uphold their mission of protecting lands forever.

The CFO is responsible for annual and long-term financial planning and analysis including the bottom-up budgeting process from which the organization's annual workplans are developed. Additionally, the CFO is responsible for asset management, banking, risk management and insurance, audit and internal controls, and oversees the management and coordination of contracts and grants budgeting, financial operations and reporting, contract review and compliance, as well as human resources, IT and facilities.

The CFO has a key role in sustaining and cultivating the collaborative internal culture and ensuring SLT continues to be a great workplace environment. The CFO is responsible for the administration of the systems and facilities required to support a healthy and productive worksite and culture. As the head of Human Resources, the CFO is responsible for fostering an environment that treats staff members with

respect and equity, empowering them to excel in their positions. An important strategic goal for SLT is the further development of policies, practices and outreach that will increase diversity, equity and inclusion (DEI) which is essential to SLT's mission.

Sonoma Land Trust has been consistently growing. It has an active acquisition portfolio with many land transactions in development. Significant investments are also being made in stewardship activities including monitoring, restoration, and access. Additionally, SLT is making deeper investments in community engagement, DEI, and is in the planning stages for a new fundraising campaign. Planning for annual needs and implementing the policies and practices that will ensure that SLT can meet its long-term goals and responsibilities requires an engaged, highly communicative and enthusiastic CFO.

SLT's total assets were approximately \$41 million dollars at FYE 3/2018, including conservation lands and improvements. SLT's 2018-2019 operating budget anticipates \$6.4 million in total expenses and requires approximately \$2.25 million in new unrestricted contributions. Unrestricted and unallocated funds serve as a reserve and were approximately \$5 million at FYE 3/2018. In early 2018 SLT shifted its year-end to March 31 so that a clear understanding of calendar year-end revenue could inform the budget process.

The CFO supervises a strong and established team of 4 staff including the Controller, Senior Accountant and Accounting Assistant and an Office Manager, in addition to external consultants for IT. A new role of Human Resource generalist is anticipated as part of this transition. The CFO will be expected to review and determine the needs in this area. Previously the CFO handled all Human Resources activities personally. This person reports to the Executive Director and acts as the Chief Financial Officer under the California Nonprofit Integrity Act and is an officer of the Corporation. This opening follows the recent announcement by SLT's long-time, beloved CFO that he will be retiring in November 2018.

## **Background**

Although many people visit Sonoma to enjoy the more than 400 wineries, they often stay for the beauty of the landscape. Growing cultural amenities and interest in local products, sustainable agriculture, and viticulture have brought a new sophistication to a community with deep roots and a strong sense of place. In Sonoma, it is all about the land. Conservation is supported in the county by a voter-approved ¼ cent sales tax which funds the Sonoma County Agricultural Preservation and Open Space District. First approved in 1990, this tax was reauthorized for 20 years in 2006 with a stunning 75% yes vote.

Conservation efforts in the county are highly collaborative; joint and overlapping missions are regularly tapped to find the right resources and skills to steward the shared vision of the county as preserved in perpetuity with rich and healthy ecosystems and easily accessible parks and wildlands. Regional efforts to safeguard wildlife corridors, prepare for climate change impacts and tackle complex, whole system restoration is possible given this level of partnership and broad support for conservation.

Even through the 2017 firestorm that devastated neighborhoods and created challenges for the county, the interest and commitment to the land and the landscape remain strong. Sonoma County values the rich diversity of the natural environment and supports continued protection, health and access to wildlands.

## **History and Successes**

The Sonoma Land Trust has evolved from a dedicated grassroots organization to a leader which strategically selects land with high conservation values and collaboratively works with a wide range of partners to ensure protection, stewardship and grows community engagement in conservation. Over the years, the SLT has been gifted a number of historic properties including Glen Oaks Ranch in Glen Ellen and Laufenburg Ranch. These properties together with others make up a set of Anchor Preserves designated as properties held for their community engagement potential, historical and education value as well as their conservation value. Through increased programming these sites are focal points for

growing the understanding and appreciation of the array of work that is required to ensure the county's wildlands are healthy and continue to provide the natural resources and benefits to the community.

In the last few decades, SLT has been able to work on a landscape scale; that is, with many individual parcels of land protected, the focus has shifted to making connections and protecting systems such as watersheds and trail and wildlife corridors as well as agricultural lands and working landscapes. A number of other properties including Live Oaks Ranch have been set aside as ecological preserves and are managed for their unique contributions including critical wildlife linkages and unique habitat.

In 2016 SLT surpassed a milestone of protecting 50,000 acres in its 40 years of conservation work. Sonoma Land Trust currently holds title to about 4,000 acres of land and conservation easements on another 7,000 acres. Often land will come into the portfolio for some time before it transitions to other partners to hold and manage in perpetuity. SLT also partners with other organizations providing technical support and expertise to ensure key properties are conserved across the county.

### **Current Focus and Program Highlights**

In its 2016-2020 Strategic Plan, SLT reasserts the mission of protecting the scenic, natural, agricultural and open landscapes of Sonoma County for the benefit of the community and future generations by:

- Developing long-term land protection strategies;
- Promoting private and public funding for land conservation;
- Acquiring land and conservation easements;
- Practicing stewardship, including the restoration of conservation properties; and
- Promoting a sense of place and a land ethic through activities, education and outreach.

Four overarching strategies and goals define the current plan. They include:

- Complete key projects that protect and steward treasured landscapes of Sonoma County to safeguard our land and water systems, retain ecological functioning and build resilience in the face of climate change.
- Build a broad and diverse constituency base with an array of fresh voices for conservation actively engaged in programs and projects that enhance the well-being of our communities.
- Sustain a strong team of board, staff and volunteers to foster a positive, thriving organizational culture and provide sufficient capacity to achieve the goals of this strategic plan.
- Raise the necessary funds to achieve the organization's goals and ensure long-term financial security.

One new and growing program demonstrates SLT's interest in ensuring the community continues to explore and appreciate the county's natural environment. In its second year, SLT's Bay Camp is a bilingual week-long outdoor adventure camp based at Sears Point Ranch. Three sessions offer kids 7-14 unique experiences and an introduction to the amazing natural spaces in the county. Through generous support from sponsors, this year a majority of campers were provided with scholarships to ensure diverse access to these transformative experiences.

### **DIRECTOR OF FINANCE & ADMINISTRATION/CHIEF FINANCIAL OFFICER ESSENTIAL DUTIES AND RESPONSIBILITIES**

#### **Leadership and General Management**

- Act as the primary advisor to the SLT Board of Directors and the Executive Director on all financial matters; explore both current and forward-thinking scenarios for planning;

- Work closely with the ED, Board, Executive Team and other staff leaders in the execution of the strategic plan and development of financial and operational strategies for annual and long-term financial management and sustainability;
- Provide financial reports and analysis for SLT Board of Directors, Finance Committee, Executive Director, and staff that are accurate and ensure informed decision-making;
- Together with the ED, Board and staff assess opportunities and risks related to SLT's goals, strategies, programs and general operations and provide analyses that highlight potential costs and benefits;
- Guide the financial and administrative development of the organization especially through the annual operating budget process; ensure healthy and responsible growth in the context of the organization's goals and resources;
- Foster a culture that builds a diverse workforce, values healthy work-life balance, develops leadership and engagement across the organization, engenders trust and reflects SLT's family-oriented values;
- Represent SLT to key partners, prospective donors and the public; participate in the development of relationships important to SLT's mission and operations.

### **Financial Management**

- Assess, develop and implement effective and efficient financial systems and processes providing for effective internal control, accurate and timely financial reporting and efficient operations;
- Implement an effective annual budget process utilizing the newly selected Adaptive Insights software; work closely with the accounting team and department heads to oversee the development, updates and regular variance analysis of the operating budget.
- Report to the Finance Committee and Board of Directors regularly on the financial health of the organization including fundraising progress, financial results relative to budget, liquidity, cash flow and reserve fund allocation;
- Manage finance, banking and cash flow to ensure protection of assets, liquidity, maximization of interest income and efficient operations; retain strong working relationships with banking partners and investment partners;
- Manage all aspects of risk; work with various internal partners to understand and assess the exposure and needs; build strong policies and insurance partnerships to ensure risk is mitigated;
- Oversee procedures, computer systems and staffing necessary to maintain proper records in accordance with accounting regulations for nonprofit organizations and Land Trust Alliance accreditation;
- Monitor and oversee short and long-term investments; support the development of new policies as needed to maximize value; Work with the Investment Committee of the Board and external investment advisors to manage the long-term investment portfolio of approximately \$5M;

- Work closely with senior staff to support their effectiveness in program financial management, grant budgeting and planning and related activities; work with managers to track and regularly report financial information;
- Work closely with Development Department on contribution reporting and gift acceptance; manage proper liquidation of planned and special gifts working with donors, trustees and executors;
- Oversee the annual audit process; ensure strong operational and financial controls and that the highest levels of integrity and transparency are maintained; oversee annual audit and tax preparation by outside public accounting firm;
- Ensure compliance with all federal, state and local laws and contract requirements; monitor and ensure accurate and timely grant and contract compliance including the preparation of the Indirect Cost Rates for Federal contracts;
- Oversee SLT contract and grant management; including appropriate record keeping for all contracts, grants, leases and other agreements; assist in the preparation of grant and contract proposal budgets and reports, as appropriate.

### **Administrative Management**

- Recruit, retain and mentor a strong and effective accounting and administration department; manage the people and processes required to ensure a clean, inviting and effective working environment;
- Oversee all Human Resources functions including future Human Resources staff, ensure SLT's compliance with all federal and state labor laws, personnel policies, compensation and benefits administration, payroll administration, recordkeeping, employee relations and annual performance review process;
- Cultivate an environment that fosters SLT's values of creating opportunities for employees to learn, collaborate and achieve their best work in support of SLT's mission; assist the Director of Community Program in developing and implementing the Diversity, Equity and Inclusivity Plan;
- Develop and maintain effective policies to protect and manage SLT's physical assets including facilities, equipment, vehicles, software and other resources; maintain appropriate levels of liability, property, and casualty insurance;
- With external consultants ensure the effectiveness and security of SLT's management information systems and communication infrastructure; oversee the operation of the computer network and desktop systems, hardware and software programs and other technology critical for daily work;
- Assist and advise the Office Manager in the resolution of any technological issues and problems; and assess the technology infrastructure needs of the organization;
- Assist with construction contract review; support decisions regarding building and property materials, processes and issues for historic and conservation properties;
- Oversee the maintenance of office building and grounds; ensure clean, comfortable and safe work environment for employees and visitors;

- Monitor legal issues through resolution, including financial, leases, purchases, contracts and insurance;
- Perform other related responsibilities as needed and as determined by the ED and Board of Directors.

## **Experience**

A successful CFO candidate will likely have:

- Significant experience in financial and administrative management, ideally with experience in a growing nonprofit organization of similar size with complex fund accounting;
- Bachelor's degree in Accounting/Finance, or Business; Master's or CPA preferred;
- Expertise in business planning, budget development and assessments, risk analysis and resource development;
- Experience with organizational growth; able to support and manage change while retaining cohesiveness to the values and norms of the organization;
- Demonstrates resourcefulness in setting priorities, creating efficiencies and guiding investment in people and systems;
- Technologically savvy; experience working with IT and program staff to develop and implement new processes and systems that increase efficiencies;
- Seasoned in overseeing management of Human Resources, benefits management and related;
- Excellent written and verbal communication skills and ability to listen well to others;
- Excellent skills in Excel, Word, and financial accounting and budget analysis software;

## **Attributes**

- Passionate about nature; experience or demonstrated curiosity in land conservation and stewardship;
- Demonstrates exceptional integrity and a strong work ethic; able to become a trusted resource for the Board and leadership team; capable of encouraging ambition or constraint as appropriate given the resources, timing and capacity of the organization;
- Is people-centric, accessible and demonstrates clear and thoughtful communication; understands human resources are highly valuable and require appropriate attention;
- Committed to transparency; creative and solutions-oriented; works from a servant-leader stance;
- Capable of knowing and understanding detailed information while communicating just those details that can inform decisions with the appropriate short and long-term implications, risk and opportunity cost; understands the need for fast, frequent and relevant information;
- Proven ability to work collaboratively; able to remain flexible and good-natured while managing deadlines and time constraints;

- Strong interpersonal skills; enjoys working with people; a model of behavior exercising accountability, cultural sensitivity and self-care;
- Can balance the need for accountability and internal controls with the need for nimble, flexible solutions that decrease workloads and create efficiency;
- Emotionally mature, someone who is both confident, approachable and who appropriately and regularly engages humor.

For additional information or to be considered for this role send materials or contact:

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