

Position Summary:

Title: Chief Operating and Strategic Initiatives Officer

Organization: Florida Community Loan Fund

Reports to: CEO

Direct Reports: TBD

Employee Count: 20

Location: Orlando, FL

Website: fclf.org

Florida Community Loan Fund seeks an experienced and collaborative DEI-focused non-profit leader who has experience in operations and strategic initiatives to oversee the organization's HR and IT functions and advance racial equity. Successful candidates will bring experience in affordable housing finance or the community development space.

The Organization

Florida Community Loan Fund (FCLF) is a nonprofit lending institution providing capital and expertise to make projects successful and help organizations improve lives and low-income communities throughout the Sunshine State. Established in 1994, FCLF operates statewide from a network of offices in Orlando, Tampa, and Fort Lauderdale. FCLF financing has helped more than 200 organizations succeed in their projects, providing over 540,000 Floridians annually with housing or essential services through 375+ lending transactions to projects totaling over \$1.21 billion.

FCLF is a dynamic, growth-oriented community development financial institution with an energetic 20-person team, \$400 million in assets under management and an annual budget of approximately \$7.5 million.

Position Summary:

The COSIO position requires maintaining working relationships with fellow team members, borrowers, potential clients, consultants, vendors, financial institutions, partners, other public and private sector institutions and peers in the field of community development, as well as FCLF's Board of Directors and committee volunteers. This position reports to the CEO and is part of FCLF's Executive Team which currently includes the CEO, CFO, and CLO.

Required Knowledge, Skills & Abilities ("Must Haves")

- 5 - 10 years of relevant professional experience in leadership positions of increasing responsibility; previous experience leading IT, Human Resources, and Strategic Initiatives; Previous experience in the CDFI Field, Finance, and/or community development preferred
- Demonstrated track record in both leading and building the capabilities of a driven, talented, diverse, growth-oriented, mission-focused team; well-developed team building and collaboration skills
- Have a clear passion for work in low-income communities, including 5 or more years of experience in breaking new ground to lead social change in the areas of community development financing, product, and new strategic initiative development, as well as internal and external relationship development
- Excellent listening, creativity, and innovation capabilities; strong DEI lens and focus coupled with must be genuinely committed to advancing racial equity; Superior communication, interpersonal, presentation, relationship management, influencing, negotiation, persuasiveness, and diplomacy skills

Essential Duties

The Chief Operating and Strategic Initiatives Officer (COSIO) has the following responsibilities:

Execute Strategic Plan. Work in partnership with the CEO, CFO and CLO, and department managers at all levels of the organization to execute the Strategic Plan to deliver on the goals of the strategic plan, implement new processes and approaches, achieve plan goals, and strengthen internal capacity:

- Work with the executive team to implement annual department and executive-level work plans to ensure that FCLF is on track to meet goals articulated in its Strategic Plan
- Support the CEO (and Board) in creating an organizational staffing growth and succession plan that provides internal infrastructure and develops the capacity to succeed with programs and goals
- Lead the staff performance management process along with the executive team in such a way that all systems and operations are functioning efficiently and effectively to meet growth and performance goals
- Lead jointly with CEO all future strategic planning processes (next scheduled for FY2024)

Support the CEO. Assist and collaborate with the CEO on certain key functions:

- Conduct and present at Board meetings
- Communicate with the Board, committees and consultants
- Communicate the brand and key messages internally and externally
- Monitor staff adherence to all operational policies and practices; support CEO and Executive Team in developing new ones, as needed, including ones affecting authority levels
- Human resources management
- Represent FCLF to partners and stakeholders as needed

Manage FCLF's Human Resources Function. Provide a strong day-to-day human resources and operational leadership presence for all staff; support an open-door policy for all staff members with primary responsibility and shared responsibility as follows:

- Annually
 - Review FCLF Employee Benefits and the vendors providing those benefits in consultation with CFO and CEO, and with the assistance of HR Consultant to present a competitive benefits package to the FCLF Team
 - Review and update job descriptions as needed
 - Coordinate annual employee review process
 - Update salary ranges for all positions and develop annual increase matrix for the year
 - Assist CEO in annual bonus process
- Periodically
 - Lead and manage, with assistance from Compensation Consultants the benchmarking of all existing and planned positions to determine salary ranges compared to market (every 3-4 years)
 - Update position salary ranges by engaging compensation consultants
 - Coordinate with CFO/Finance department as needed for payroll operations and other HR related accounting functions
 - Primary point of contact with FCLF's HR professional service providers (ex. HR Consultant, Compensation Consultant)

Manage FCLF's IT Function and Facilities Needs. Manage information systems and processes, technology, and space needs for the organization for maximum functionality and efficiency, including efforts to improve internal data systems across departments; maintain and update the comprehensive disaster recovery plan; and maintain server systems:

- IT Function
 - Primary responsibility for ensuring IT system functionality through Coordination with external consultants and/or internal staff
 - Perform periodic evaluations of current and future IT systems needs, develop plans to meet future IT demands, and implement those plans ensuring FCLF's IT systems integrate across all functional areas
 - Manage and oversee the technical aspects of all FCLF technology, including loan tracking systems, accounting systems, and impact data management systems
- Facilities
 - Manage FCLF leased space across all locations as the primary point of contact with building representatives
 - Anticipate future location needs and identify, along with local FCLF staff, suitable office space in the main office and appropriate work environments in all other locations
 - Negotiate leases, develop and update office space plans, and ensure the proper physical security of FCLF personnel and property

Lead New Initiatives. By developing tools to assist the Executive Team and Board, evaluating various new opportunities, and leading the implementation of new initiatives arising from those evaluations.

- Provide summaries and analysis of potential new opportunities to the Executive Team, including evaluation of alignment with strategic priorities and organizational mission, and evaluation of existing internal resources and any new additional resources required to successfully implement those initiatives
- Develop plans to implement new initiatives
- Manage, along with the CEO and the Executive Team, the successful implementation of those initiatives
- Depending on the plan, COSIO must be capable of leading new initiatives during the initial phases until such time as a manager for that initiative is identified and hired
- Develop evaluation criteria to assess the effectiveness of those initiatives and their effect on FCLF's mission and financial objectives

Oversee FCLF's External Communications Function. The newly created External Communications Function will include existing and future staff dedicated to capitalization and fundraising, marketing and communications, and government relations. The COSIO will have dotted line responsibility along with the CEO to oversee the department.

Florida Community Loan Fund has retained BroadView Talent Partners to lead this search.

"Interested and Qualified" candidates should contact:

Johanna Vargas

Vice President, Senior Associate

office 203.651.8300

mobile 786.417.0721

johanna@broadviewtalent.com

or apply directly on [LinkedIn](#) or on BroadView Talent Partners' [website](#).