



JOB DESCRIPTION

Financial and Systems Controller

DEPARTMENT NAME: Finance and Administration

POSITION REPORTS TO: Chief Financial Officer

OFFICE LOCATION: 75 E. Santa Clara Street, Suite 1350, San Jose, CA

OFFICE OPERATING HOURS: 8:30 AM to 5:00 PM

MISSION AND HISTORY

Housing Trust is leading the effort to create a strong affordable housing market in the greater Bay Area as one of the region's highest-volume nonprofit housing lenders. Serving people experiencing homelessness to renters to first-time homebuyers, we assist a wide range of residents with programs across the entire spectrum of housing issues. Since 2000, Housing Trust has invested \$200 million – creating more than 18,600 affordable housing opportunities serving over 33,500 of our neighbors. Housing Trust is the first nonprofit Community Development Financial Institution (CDFI) to receive a Standard & Poor's rating (AA-) because of its strong capacity to meet financial commitments.

POSITION OVERVIEW

Are you a proven financial analyst with accounting and systems experience looking to broaden your scope in finance and administration while making a positive impact on one of the most serious crises facing our region? Are you analytical, dedicated, and mission driven? And, do you take pride in your work and thrive in a collaborative environment with people who also exhibit these qualities? If so, Housing Trust Silicon Valley is the place for you.

Reporting directly to the Chief Financial Officer, you'll contribute to the Housing Trust's success through providing financial and systems expertise you have gained in your career to improve cohesiveness of accounting, mortgage servicing, and CRM systems as well as policies and procedures and contract and vendor management.

This is an ideal opportunity for someone with at least 10 years related experience who is interested in a broad finance role in a growing mission driven organization. Who will be successful in this role? Someone who works independently and thrives in a fast-paced environment. Someone who enjoys working on a variety of projects and topics within Finance and Administration, taking ownership of coordinating projects and delivering results including an impact on the bottom line. Someone who is interested in learning about affordable housing and finance. Perhaps, someone like you?

KEY RESPONSIBILITIES

Financial Planning and Analysis

- Lead the budgeting process: develop timelines and presentations. Work with the financial analyst to improve models and create appropriate dashboards.
- Translate financial results into reports to Finance Committee and board
- Prepare financial models for special projects including long-term forecasts. Improve the existing forecasting tools.
- Prepare quotes for and analysis of new programs
- Responsible for updating the Offering Memorandum annually and the associated Community Impact Notes. Approve and review interest payments. Help select and implement a system to manage investors and interest payments.
- Lead assessment planning and execution for S&P and Aeris and other regular assessments by outside entities
- Recommend process improvements

Systems and IT

- Lead investigation and implementation of new or upgraded 1) accounting and 2) mortgage servicing systems relying heavily on the Housing Trust subject matter experts in the process. Goal to move to the cloud with servers only for backup. Understand those two systems plus Salesforce and be able to recommend how they can work better together and which system is best suited for specific operations.
- Provide oversight of IT working with the office manager and with specific projects including
 - Disaster Recovery plan development and maintenance
 - Develop discipline and system to protect from password and system hacking.
 - Draft and implement policies and procedures
 - Further the implementation of Box including the Governance module and ensure that proper training is completed by new and existing users. Develop mini trainings and tips for all hands meetings.

General Finance and Accounting Support

- Take on specific monthly close review and approvals including investment confirms to provide further segregation of duties
- Assist with preparation of audit schedules as they relate to your area of responsibility
- Suggest process improvement and drive cost savings investigations and roll-outs. Generally be a team member who can bring ideas to help us scale efficiently

Administration

- Manage and track all corporate contracts and ensure that business leader has written an onboarding summary. Include accounting treatment where appropriate. Manage any outside legal reviews of contracts.
- Operational risk management of Finance, Admin, HR, IT including policies and procedures (specific areas include systems above and fraud prevention).
- Maintain and update Finance and IT policies and procedures working closely with rest of team.

QUALIFICATIONS

- Bachelor's degree in Economics, Accounting or related field and at least 10 years experience in financial planning and analysis, accounting, and/or financial systems
- Demonstrated analytical and financial modeling skills
- Exceptional attention to detail and accuracy
- Experience with database software, accounting systems and expertise in Excel
- Proficiency in other standard office software - Outlook, MS Word, and PowerPoint
- Operate with the highest degree of integrity
- Effectively accumulate and present data, verbally and in written form

COMPENSATION

Housing Trust offers a competitive compensation package, including a bonus plan and benefits. This is a full-time, exempt position. Compensation for this position is dependent on experience.

Resumes will be reviewed and considered on an ongoing basis. To be considered for this position, please submit a letter of interest and resume to Jobs1@housingtrustsv.org.

Housing Trust is an equal opportunity employer to all regardless of race, color, national origin, ancestry, sex, marital status, disability, religious or political affiliation, actual or perceived gender identity, age or sexual orientation. Housing Trust is committed to diversity, equity and inclusion and our goal is to have a workforce (at all job levels) that is representative of the communities we serve.