



CARLSONBECK

Position Specification



Chief Financial Officer

15 June 2026, vF



Carlson Beck advises **Eviction Defense Collaborative** on the basis of an exclusive consulting engagement. The following details are for your information and should be shared with discretion.



POSITION SPECIFICATION

THE POSITION: CHIEF FINANCIAL OFFICER

REPORTS TO: EXECUTIVE DIRECTOR

LOCATION: SAN FRANCISCO, CALIFORNIA

THE ORGANIZATION

Mission

Eviction Defense Collaborative (EDC) works to prevent homelessness before it starts and keep San Franciscans housed by providing Compassionate, high quality legal assistance, rental assistance, and supportive services to San Francisco tenants facing eviction or housing instability. We believe that housing is a human right and we strive to ensure that every San Franciscan has meaningful access to justice and the resources needed to remain safely housed.

Established in 1996, the EDC serves over 5,000 residents annually, aiming to prevent homelessness and stabilize housing for vulnerable populations.

Key Services & Impact

Emergency Legal Services: As the lead agency in San Francisco's Tenant Right to Counsel program, EDC offers free legal representation, aiding tenants with unlawful detainer lawsuits.

Rental Assistance (RADCo): Provides immediate financial aid for back rent to prevent eviction.

Shelter Client Advocacy: Protects residents of city-funded shelters and transitional housing from unfair service denials.

Focus on Equity: Assists tenants regardless of income or immigration status, with specialized focus on seniors, families, and residents at risk of homelessness

For more information go to: www.evictiondefense.org

A Compelling Leadership Opportunity

This is a rare opportunity to step into a true builder role at a moment of urgency and growth. As the inaugural Chief Financial Officer (CFO), you will design and lead the financial strategy and operations that enables EDC to scale its impact, supporting emergency legal services, rental assistance, and tenant advocacy for low-income households facing eviction. Your work will have a direct, tangible effect: translating sound financial strategy into families staying housed and communities remaining stable.



Beyond the mission, this role offers a meaningful seat at the leadership table, to be an integral part of EDC's financial future. The CFO will partner closely with the Executive Director (ED) and Board to shape vision and strategy, navigate complex funding streams, and ensure long-term sustainability. It's an ideal position for a leader who wants to pair technical expertise with purpose, building systems, guiding decisions, and helping an organization move from execution to lasting, scalable impact.

THE OPPORTUNITY

This role positions the CFO as a strategic partner to the ED and Leadership Team, shaping and operationalizing the financial operations and strategies that sustain the organization's financial health and advance its mission in a rapidly evolving environment. The CFO will play a central role in building a financial infrastructure that will ensure long-term financial viability, bring rigor to planning, clarity to decision-making, and resilience to the organization's financial model as it adapts to changing funding landscapes.

The ideal candidate brings deep experience in nonprofit financial leadership, including budgeting, forecasting, cash flow management, and risk mitigation, along with a strong command of government funding and compliance. This is a compelling opportunity to help lead a mission driven organization through a period of growth and complexity, strengthening core operations, ensuring financial health of the enterprise, supporting multiple service lines, and partnering with the ED to navigate uncertainty while pursuing new partnerships and program innovations that expand impact.

Organizational Leadership

EDC has an operational budget of \$25M and a staff of 90+. EDC is governed by a seven-member Board of Directors. 80% of EDC's workforce is unionized, represented by NOLSW UAW 2023.

The Leadership Team of EDC consists of

- Chief Financial Officer
- Chief Program Officer (recruitment launch 10/1/26)
- Director of RADCo
- Director of Shelter Client Advocates
- Director of Public Funding
- Director of Litigation
- Director of Human Resources

The CFO will be responsible for a staff of three and three direct reports, including:


- Controller
- Director of Public Funding
- Manager Information Technology

Currently the staff is in the EDC offices three days a week.

Responsibilities

Financial Management

- Develop and implement financial systems, strategies, policies, and procedures to drive the organization's financial success and long-term sustainability.
- Oversee budgeting, forecasting, and financial planning processes, ensuring accurate financial reporting and analysis and providing timely and actionable insights that impact results.

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- Monitor and analyze financial performance, identify areas for improvement, and provide strategic recommendations to the leadership team and the Board of Directors.
 - Manage cash flow and financial risk to optimize resources and achieve organizational objectives. Ensure compliance with relevant financial regulations, accounting standards, and reporting requirements.
 - Oversee the preparation, analysis, and presentation of financial reports, budgets, and forecasts to the ED and Board of Directors.

Leadership, Management and Culture

- Contribute actively to strategy setting, including evaluating and modeling the financial impact of strategies under consideration by the Leadership Team and the Board of Directors.
- Collaborate with the ED and leadership team to strengthen and modernize EDC's operational infrastructure, evolve the service portfolio, and enhance cross-department collaboration to optimize impact.
- Clearly communicate financial benchmarks, expectations, performance, and trends, ensuring the Board of Directors, ED, and other stakeholders are informed on a timely basis. Attend and present at board meetings and staff board committees.
- Support and uphold the GREAT values of EDC: Gratitude, Responsibility, Excellence, Adaptability and Trust.
- Build, lead, mentor and nurture a finance culture of organizational maturation and growth; one that values continuous improvement of business processes, best practices, effectiveness and customer service.
- Create a climate in which staff are encouraged to learn new skills and seek new responsibilities.
- Build strong relationships with external stakeholders, including government agencies, financial institutions, donors and community partners. Represent the organization in financial and strategic matters as required.

Public Funding & Compliance

- Provide strategic oversight and supervision of the Director of Public Grants, ensuring effective management of all government-funded contracts and revenue streams.
- Develop and maintain strong working relationships with key public funding partners, including the City and County of San Francisco, the State Bar of California, and other governmental funding agencies, serving as a senior financial liaison when necessary.
- Ensure timely, accurate, and complete invoicing, reimbursement requests, and financial reporting to maximize revenue collection and maintain strong cash flow.
- Oversee organizational compliance with all grant, contract, and regulatory requirements, including cost allocation methodologies, financial reporting standards, audit readiness, and internal controls.
- Ensure expenses are appropriately classified and charged in accordance with funding requirements, including maintaining clear separation of direct, indirect, allowable, and unallowable costs, and preventing expenses such as fundraising, lobbying, penalties, or other non-reimbursable activities from being charged to government contracts.
- Partner with program and finance leadership to strengthen fiscal stewardship, improve grant performance, and ensure the organization remains compliant while maximizing reimbursement opportunities across all public funding sources.

Information Technology

- Develop and implement an IT strategy that aligns with the organization's overall objectives and supports efficient operations and security requirements.
- Oversee the management of IT infrastructure, systems, and applications, ensuring data security, privacy, cybersecurity protocols and compliance.

- Identify and implement technology solutions to streamline operations, improve productivity, and enhance data analytics capabilities.

CANDIDATE QUALIFICATIONS/EXPERIENCE

Education: Bachelor's degree in accounting, finance, or related degree required. Master's degree in business administration, finance, accounting or related degree preferred. CPA certification and audit firm experience is nice to have but not mandatory.

Experience: A minimum of ten years as a CFO or senior level financial executive in a similar sized nonprofit organization or a complex business environment; experience in the fields of affordable housing and/or legal services is valued.

Experience working with governmental funders at City & County levels and the State of California. Preferred experience working directly with the City and County of San Francisco

Experience working in partnership with a CEO/ED and a Board of Directors on strategic and operational matters that include and extend beyond financial accounting.

A solid foundation of financial planning an analysis, accounting, revenue cycles, forecasting, and strong nonprofit and government contract experience.

Experience strengthening technological capabilities to increase financial accuracy and for more efficient financial operations. Experience using financial data to inform decision making.

COMPETENCIES/ATTRIBUTES

The ideal candidate is:

- A **strategic thinker** and **thought partner** to the ED.
- A leader with **business acumen** and **financial savvy**.
- A **confident, proactive** and **responsive leader of financial operations**.
- A **skilled negotiator**, including public sector funders and unionized workforce negotiations.
- A leader who **empowers** colleagues and **fosters inclusivity**.
- Able to **engage in continued conversations about justice, equity, diversity, and inclusion**, with a racial equity focus, and to apply those conversations to daily work.
- Highly **effective** and **well-honed verbal and written communication** and presentation skills.

The ideal candidate brings:

- The **highest level of professionalism, stewardship and integrity** in executing the CFO role.
- **Approachability and effective interpersonal skills** demonstrated when interacting with staff, Board, external stakeholders, government workers, vendors, and constituents, including patience, tact, and courtesy.
- **Excellent oral and written communication skill** to appeal to a variety of audiences; ability to proactively communicate with the ED and board members when appropriate and translate complex financial concepts and data in an understandable manner; **attentive listening skills**.
- Experience as a **strategic thinker** and an **operational builder regarding financial operations**; capable of both big picture thinking and directing tactical implementation; able to “connect the dots” of disparate areas of EDC’s service areas and programs.
- Leadership as a **seasoned finance professional** able to meet the demands of an organization with a



- complex underlying financial and operational structure.
- Experience **leading through a time of organizational growth and transformation**, i.e., taking financial operations to the next level to optimize organizational impact.
- **Respect** for EDC's history and track record while engendering future success via **creativity and innovation**.
- Ability to make **difficult decisions** while being able to deal successfully with **nuance and complexity**.
- A **collaborative** and **mission-driven mindset, humility** and a **sense of humor**.

It is not necessary to meet all the criteria above to apply and be considered for this critical position.

COMPENSATION

Total target compensation for this position, base and incentive bonus, will be in the range of \$175,000 to \$200,000. Additionally, comprehensive benefits and flexible time-off (FTO) packages are offered.

HOW TO APPLY

To initiate consideration for this opportunity, **please submit a resume and cover letter**, speaking to your qualifications as per this Position Specification, to the Carlson Beck representatives below. For additional information regarding this opportunity, please contact:

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