



Position Profile



Florida Community Loan Fund
Chief Operating and Strategic
Initiatives Officer



Table of Contents



The Organization.....	3
The Candidate Profile.....	7
• Position Description & Summary	
• Required Knowledge, Skills & Abilities	
• Essential Duties & Responsibilities	
• Additional Responsibilities	
• Other Desired Skills & Abilities	
• Measures of First Year Success	
• Education Requirements	
• Compensation	
BroadView Talent Partners Team.....	23
Contact.....	24
...	



The Organization





What We Do

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 1.35 million low-income Floridians annually with housing or essential services through 425+ lending transactions to projects totaling over \$1.4 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 \$8.5 million.

Our Impact

[View the 2022 Impact Report](#)



6,822

affordable housing
units



18,098

jobs retained

13,706 temporary
construction jobs and
4,392 permanent jobs



168

community facilities,
totaling **2.7 million**
square feet



1.35 m

Floridians received
essential services
every year

About Orlando, Florida



Centrally located in Florida, Orlando, offers a perfect balance between urban and suburban living. While famously known to be the home to Disney World and Universal Studios, Orlando is much more than the sum of its theme parks – it is a vibrant city with so much to offer! Living in Orlando brings together the best of living, business, and recreation. In addition to being a safe, family-friendly city, with an affordable cost of living, the schools are great, as is the healthcare. No wonder it ranks so high in *U.S. News Best Places to live in Florida*.



The Candidate Profile



Position Description



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





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



Other Desired Skills & Abilities

Leadership

Ability to effectively build organization and staff capacity, develop an engaged workforce and the processes that facilitate the organization running smoothly with high morale.

Results Focused

- Proven track record of exceeding goals and delivering exceptional results
- Evidence of the ability to consistently make good decisions through a combination of analysis, experience, and judgment
- Problem-solving, project management, and creative resourcefulness

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Other Desired Skills & Abilities (cont'd)

Action Oriented

- Must enjoy working intensely and welcome challenges
- Ability to act and react as necessary, even if limited information is available
- Must not be afraid of conflict or to take charge of a situation
- Ability to communicate directly, overcome resistance to change, and take unpopular stands when necessary

Strategic Vision and Agility

Ability to think strategically, anticipate future consequences and trends, and incorporate them into the organizational plan.

General Management

- Thorough understanding of operations, IT, and Human Resources
- Understanding of CDFI business models
- Broad experience with the full range of business functions and systems
- Must be highly organized and flexible

Essential Duties & Responsibilities

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

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Essential Duties & Responsibilities (cont'd)

Execute Strategic Plan (cont'd)

- 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

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Essential Duties & Responsibilities (cont'd)

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)

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Essential Duties & Responsibilities (cont'd)

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
- Facilities
 - Manage and oversee the technical aspects of all FCLF technology, including loan tracking systems, accounting systems, and impact data management systems
 - 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

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Essential Duties & Responsibilities (cont'd)

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.

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Additional Responsibilities (cont'd)

Investor/Funder Relationships

Assist the CEO and CFO with investor/fund relationships:

- Support the development and implementation of systems for reporting, measuring and supporting funding/fundraising initiatives
- Assist in effective proposal preparation and operating grant writing, which may include writing request rationale

Measures of First Year Success



Relationships

- Establish and build trust with the senior leadership team, board members, and other key stakeholders
- In tandem with the CEO, creatively and collaboratively plan and execute projects, conceptualize and formulate strategic organizational initiatives



Operations and Initiatives

- Collaborate with the CEO and board in developing organizational vision, strategic planning, performance measures, and operations strategy
- Implement and execute standard policies and operating procedures for HR and IT functions
- Facilitate improvements to the social impact tracking system



Organizational Structure

- Artfully design, develop, and implement DEI initiatives and strategy to attract, hire, select, and retain a diverse team; build middle management team and staff
- Foster a transparent, collaborative, cohesive, and accountable culture
- Advance FCLF's racial equity work



Business and Pipeline

- Understand the financial and operational aspects of the organization and existing projects
- Support a marketing communications strategy to improve brand recognition and visibility

Education Requirements



Undergraduate degree required;
MBA or similar advanced
degree desired.

Compensation

This position offers the unique opportunity to join an innovative organization with the vision and expertise to make a difference in disadvantaged communities throughout Florida.

Florida Community Loan Fund offers a competitive base salary as well as excellent benefits and perks including but not limited to:

- Health
- Dental
- Life, Short, and Long-Term Disability Insurance
- 403(b) Retirement Plan with employer-paid contributions
- Very generous paid time off program
- Opportunities to work with a dedicated team who are driven to aid distressed communities



BroadView Talent Partners Team

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

“Interested and Qualified” candidates should contact: **Johanna Vargas**



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About BroadView Talent Partners

Executives in affordable housing, nonprofit, and middle market organizations retain BroadView Talent Partners to fill senior leadership team positions because they value our specialized knowledge and proven process for identifying executive talent using our unmatched national network, commitment to diversity, equity, and inclusion (DEI), and record of long-tenured placements.





Thank you!