



Position Profile

Insight Housing

Chief Financial Officer



PRESENTED BY: **TALENT** PARTNERS





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The Organization



Our vision: We envision a world where everyone is food and housing secure and has a caring community to call home.

Who We Are

For more than 55 years, Insight Housing (formerly Berkeley Food and Housing Project) has provided a comprehensive range of housing, food, and support services to help those in need move from homelessness into a safe and affordable home of their own.

We serve in seven Northern California counties - Alameda, San Francisco, Contra Costa, Solano, Sacramento, San Joaquin, and Amador County. We are proud of our team members who are very dedicated in our mission to ensure everyone in our community has a home through supportive, equitable, and sustainable housing solutions.



What We Do

Insight Housing recognizes that our participants need more than a meal and a warm bed; they need to be respected as individuals making a transition back to full and thriving life. Depending on their individual needs, Insight Housing services can include:

- Emergency and temporary housing, rapid rehousing, permanent supportive housing
- Fresh and nutritious meals, water, and snacks
- Wellness checks and links to medical providers
- Life skills and vocational counseling
- Family reunification support

We are extremely proud of our diverse team and welcome all qualified applicants regardless of race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.



Our core values

- Engage Authentically
- Act Strategically
- Build Community
- Respond with Respect
- Be an Advocate



Insight Housing

(FY 2025)



139,000

meals
served annually



4,300+

participants
served annually



2,965

Veterans & family members
served annually

About Berkeley, California



Berkeley is one of the most vibrant, progressive, and community-minded cities in the country, a place where innovation, social impact, and quality of life come together. Located on the eastern shore of the San Francisco Bay, Berkeley offers the perfect blend of urban energy, natural beauty, and deep civic engagement, making it an ideal home for professionals committed to housing stability, equity, and community well-being.

A Mission-Driven Community with a Strong Social Safety Net

—Berkeley has long been a national leader in social justice, affordable housing policy, and community-centered support systems. The city invests heavily in services that address homelessness, mental health, food insecurity, and long-term housing solutions — aligning closely with Insight Housing’s mission. Local residents, nonprofits, and public institutions work collaboratively, creating a deeply supportive environment for organizations focused on housing and human services.

Exceptional Quality of Life —With its walkable neighborhoods, tree-lined streets, diverse restaurants, and welcoming community, Berkeley offers an exceptional lifestyle. The weather is mild year-round, outdoor recreation is abundant, and residents enjoy easy access to parks, hiking trails, and the iconic Berkeley Marina. The city’s arts and cultural scene includes theaters, live music, museums, farmers’ markets, and the renowned Berkeley Symphony.

A Hub of Innovation and Learning —Home to the University of California, Berkeley — one of the world’s leading public universities the area attracts thinkers, researchers, and changemakers. This culture of curiosity and innovation fuels progressive policy, creative problem-solving, and a strong sense of civic activism. For professionals in housing and homelessness services, Berkeley offers frequent opportunities to partner with research institutions, policy organizations, and community coalitions.

Centrally Located With Access to the Entire Bay Area —

Berkeley is ideally situated with convenient access to Oakland, San Francisco, and the broader Bay Area, making it easy to collaborate regionally, enjoy world-class amenities, and explore one of the most dynamic metropolitan areas in the country. Public transportation is robust and includes BART, AC Transit, bike-friendly infrastructure, and quick connections to major airports.

Diverse, Welcoming, and Inclusive —Berkeley values diversity in all forms cultural, socioeconomic, generational, and ideological. The city’s commitment to inclusion is reflected in its neighborhoods, its schools, and its community institutions. People who live and work here enjoy a strong sense of belonging and a collective commitment to equity and justice.

The Candidate Profile



Position Description



Title: Chief Financial Officer



Organization: Insight Housing



Reports to: CEO



Direct Reports: Director of Finance, Accounts Payable Supervisor, Staff Accountants (2), Grant Accountant, Payroll Specialist



Employee Count: 200



Location: Berkeley, CA



Website: insighthousing.org



Position Summary

The Chief Financial Officer (CFO) is a strategic partner to the CEO and a key member of the executive leadership team, responsible for stewarding our financial health, sustainability, and growth. The CFO will lead all aspects of finance and accounting for a \$31M+ multi-site nonprofit organization, ensuring excellence in financial planning, budgeting, compliance, and reporting.

In addition to leading the Finance and Accounting functions, the CFO will directly oversee the Real Estate Development portfolio. This includes supervising the Director of Real Estate Development and managing all aspects of affordable and permanent supportive housing development, from feasibility and funding to construction and integration into agency operations.

The CFO will play a central role in aligning financial resources, capital investments, and strategic planning to ensure can scale its housing impact in Northern California. The ideal candidate is a values-driven executive with deep financial expertise, strong cross-functional leadership skills, and a commitment to advancing housing justice. They will bring a collaborative mindset, a track record of managing complex funding streams, and experience supporting both compliance and innovation in a high-impact, community-based setting.



Required Knowledge, Skills & Abilities (“Must-Haves”)

- **Proven Expertise in Nonprofit Finance & Complex Funding:** Brings a strong track record in nonprofit finance, fund accounting, and government grants and contracts, with deep knowledge of GAAP, OMB Uniform Guidance, cost allocations, and audit practices. Experienced in navigating complex, multi-layered funding environments with accuracy and confidence
- **Transformational Leader & Systems Builder:** Demonstrated ability to elevate and strengthen finance functions by enhancing systems, improving processes, and increasing operational efficiency. Skilled at implementing automation, modernizing workflows, and accelerating financial close and reporting timelines
- **Real Estate Development Finance Specialist:** Well-versed in LIHTC, tax-exempt bonds, layered subsidies, and co-development structures, with a proven ability to manage the financial components of affordable housing development. Positioned to help Insight Housing advance its long-term vision of becoming a standalone developer
- **Strategic Financial Stewardship, Risk Management & Reporting Leadership:** Brings a history of owning financial strategy, ensuring organizational compliance, managing risk, and delivering clear, timely financial reporting to executives and boards. Able to provide insight-driven recommendations that support growth and mission impact
- **Team Builder, People Developer & Culture Strengtheners:** Experienced in managing through change, developing staff, and building capacity. Creates clarity, strengthens roles and processes, and fosters a collaborative, accountable, high-performance finance team
- **Hands-On, Mission-Aligned Operator with Strong Cultural Fit:** Brings an entrepreneurial mindset, a solutions-oriented approach, and a willingness to be present and engaged. Demonstrates integrity, professionalism, and a deep commitment to equity and Insight’s mission, leading with both expertise and heart
- **Strategic, Detail-Oriented Leader:** Brings strong strategic insight with a customer-centered mindset, grounded in user experience and empathy, and upholds a high standard for accuracy, rigor, and attention to detail

Other Desired Skills & Abilities

- **Technical Accounting & Compliance:** GAAP, OMB Uniform Guidance, nonprofit audits, cost allocations. Strong understanding of restricted funding and compliance requirements
- **Systems & Technology Experience:** Includes accounting systems (QuickBooks, Intacct, etc.) and advanced Excel skills plus comfort with automation
- **External Relationship Management:** Experience partnering with auditors, funders, government agencies, and boards. Able to clearly communicate financial information to diverse audiences
- **Team Leadership & Capacity Building Experience:** Comfortable managing teams of 5+ and budgets of \$25M+. Skilled in staff development, coaching, and performance management
- **Ethics, Equity & Professionalism:** Commitment to housing justice and equitable resource stewardship. High integrity, discretion, and alignment with organizational mission
- **Administrative Requirements:** Valid driver's license, ability to travel locally, and insurance requirements. Must pass criminal and credit checks
- **Affordable Housing Finance Experience:** Familiarity with affordable or supportive housing finance, including real estate development, property operations, public subsidies, tax credits, or complex housing-related funding structures, would be valuable but is not required

Essential Duties & Responsibilities

Strategic Leadership & Integration

- Serve as a strategic advisor to the CEO, Board of Directors, and executive team on organizational growth, fiscal sustainability, and long-term planning
- Lead organization-wide financial strategy and risk assessment, aligning resources with mission priorities and programmatic goals
- Support equity-centered financial practices and transparency in budgeting, forecasting, and compensation
- Collaborate with executive and departmental leadership (Programs, Philanthropy, HR, IT) to ensure financial alignment across functions
- Build and mentor a high-performing Finance and Accounting team, fostering a culture of accountability, collaboration, and continuous improvement

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Essential Duties & Responsibilities *continued*

Finance & Accounting

- Lead the development and monitoring of long-term financial strategy, including balance sheet strength, capital planning, and cash flow forecasting
- Oversee all financial functions, including accounting, internal controls, payroll, AP/AR, audits, budgeting, forecasting, compliance, and investments
- Develop and manage organizational operating, capital, and infrastructure budgets in partnership with department leaders
- Supervise financial components of grants and contracts, including spend-down, funder compliance, cost allocations, and restricted fund tracking
- Lead the organization's internal audit process, ensuring timely, accurate preparation of financial statements and reports
- Oversee preparation of monthly and quarterly internal financial reports; ensure timely distribution and facilitate departmental understanding and use
- Manage treasury, banking, and investment activities and maintain relationships with financial institutions and auditors
- Ensure compliance with GAAP, OMB Uniform Guidance, and local, state, and federal regulatory requirements
- Oversee tax filings and financial reporting for government contracts and philanthropic grants
- Periodically assess financial systems and processes for efficiency, scalability, and internal control improvements

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Essential Duties & Responsibilities *continued*

Real Estate Development Finance

- Supervise the Director of Real Estate Development and lead the strategy, planning, and execution of affordable and permanent supportive housing pipeline
- Oversee project feasibility analysis, site selection, predevelopment, and development financing
- Manage all financing activities, including acquisition of tax credits, bonds, soft funds, and equity; lead lender and investor negotiations
- Ensure projects are financially feasible, aligned with the organization's mission, and integrated into long-term asset and operations plans
- Oversee development budgets, financial modeling, capital stack structuring, and reporting
- Ensure timely submission of applications for local, state, and federal funding sources
- Coordinate with Facilities and Operations to support smooth site integration and long-term stewardship

Essential Duties & Responsibilities *continued*

Fundraising, Philanthropy & Program Collaboration

- Partner with the Philanthropy team on financial planning for philanthropic initiatives, grant applications, donor reporting, and stewardship of restricted funds
- Support Programs and Services teams in aligning program budgets with funder expectations and service delivery goals
- Collaborate across departments to ensure financial tools, data, and insights support organizational learning and decision-making

Systems, Data & Technology

- Lead strategy for financial systems and software; ensure tools meet evolving organizational needs and support transparency and integration
- Oversee implementation and management of accounting systems
- Ensure alignment between finance systems and broader organizational data strategy, reporting, and compliance needs

Measures of First Year Success



Stabilize and Strengthen Core Finance Operations

- Month-end close is completed on a predictable timeline; budgets and financial data are fully integrated into the financial system; timely, accurate reporting supports contract management, spending, and organizational decision-making
- Navigate the fiscal 2026-2027 budget completion



Build a High-Performing Finance Team and Structure

- Conducts a complete assessment of staff and roles, establishes clear responsibilities and expectations, and begins building the right team (e.g., Controller, FP&A). The function becomes reliable, collaborative, and aligned with the needs of a \$30M+ organization



Implement Policies, Processes, and Systems That Improve Accuracy and Efficiency

- Introduces or updates core financial policies and procedures, distributes financial responsibility appropriately across departments, and strengthens compliance and audit readiness. Systems and workflows shift from manual, error-prone processes to efficient, technology-supported operations



Establish Strong Strategic Partnership and Real Estate Financial Infrastructure

- Builds trusted relationships with the CEO, executive team, and board through clear communication and strategic insight. Real estate development finances are properly structured and tracked, with progress made toward Insight's long-term goal of becoming a standalone developer

Education Requirements



A bachelor's degree in accounting, Finance, Business Administration, or a related field is required. A master's degree in finance, Accounting, Business Administration (MBA), or a related discipline is preferred. A CPA or equivalent professional certification is strongly preferred. Additional coursework or professional development in nonprofit finance, affordable housing finance, healthcare or behavioral health finance, or real estate is a plus.

Compensation

We are happy to provide a robust benefits package to all full-time employees.

- 100% Employee-Paid Health Insurance options
- Comprehensive dental and vision benefit
- 50% employer-paid premiums for dependents' healthcare, vision, and dental
- Flexible spending account
- Retirement Plan with discretionary employer match
- Basic Life & AD&D (Accidental Death & Dismemberment) Insurance
- Voluntary life, accident, long-term disability, critical illness care, and hospital indemnity benefits
- Voluntary pet insurance
- Mental health resources – Enhanced employee assistance program, CALM app, and various other tools
- Commuter benefits
- 19 paid holidays (including birthday/floating holiday) plus vacation and sick days.
- Paid Parental Leave
- Milestone anniversary program including 10-year anniversary sabbatical
- Professional development reimbursement plan
- Legal assistance through Rocket Lawyer
- Employee discount program

Client Search
Committee &
BroadView Talent
Engagement Team



Search Committee



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Joe DiGiacomo
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**How to
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About BroadView Talent Partners

Founded in 2015, BroadView Talent Partners is a national executive search firm dedicated to placing exceptionally talented leadership across nonprofit and for-profit sectors. We are committed to delivering clients a diverse pool of candidates, each of whom is well positioned to make a significant, positive and lasting impact on their organizations.

