



## **Low Income Investment Fund (LIIF)**

### **Job Description**

**7/9/2019**

**POSITION: Chief Strategy Officer**

**Location:** San Francisco (strongly preferred)  
**Reports to:** Chief Executive Officer  
**Title:** Head of Corporate Affairs Department  
EVP/SVP level, based on candidate  
**Classification:** Exempt  
**Status:** Regular, Full-Time

### **POSITION SUMMARY**

The Chief Strategy Officer (CSO) has leadership responsibility for the Corporate Affairs Department, comprising development, communications, strategy, as well as policy. The CSO also supports the CEO in driving the strategic planning activities of the company, and leading the company's external equity initiatives. The CSO will collaborate with a team of professionals throughout the organization, most closely with the Program and Lending staff.

### **THE COMPANY**

Low Income Investment Fund ("LIIF") is a national nonprofit Community Development Financial Institution (CDFI), formed in 1984 and headquartered in San Francisco, California, with five offices across the country. LIIF has 80 full time employees. LIIF's mission is to alleviate poverty by providing capital and technical assistance to integrated community development projects, serving as a bridge between the capital markets and low-income communities, attracting and directing private capital into under-invested areas. LIIF focuses on the "social determinants of health" via our work across housing, child care, education, health and transit-oriented development. Our capital and programmatic innovations and practices create models and templates that we utilize to inform and create policy at the federal / state / local levels, with the broader goal of systems change. LIIF's mission is to maximize its impact in low-income communities, centering its commitment to equity through its social justice and equity mission statement (appended).

With a 35-year history, LIIF has deployed approximately \$2.4 billion and served more than two million people, and is among the largest and most successful of the CDFIs in the country. To date, total financings have resulted in the creation of 33.3 million square feet of community, commercial and fresh food retail space; 75,830 units of affordable housing; 364,750 slots in quality K-12 and early education facilities; and 151,723 jobs. LIIF has loan assets under management of \$749 million. To date, LIIF has raised more than \$1 billion in off balance sheet funds. LIIF received an issuer rating from S&P Global Ratings of "A-" with a Positive outlook, in addition to the highest possible ratings from AERIS.

## **JOB DESCRIPTION**

### **POSITION: CHIEF STRATEGY OFFICER**

---

#### **REPORTING RELATIONSHIPS**

The Chief Strategy Officer reports to the Chief Executive Officer and oversees a team of eight; directly reporting to the Chief Strategy Officer is the Vice President of Development and Communications, and the Managing Director of Policy. The CSO is a member of the executive management team, along with the Chief Financial Officer, the Chief Administrative Officer, the Chief Legal Officer, and the company's President, who oversees lending and programs. The CSO will participate in LIIF Board matters, with direct interaction with board members.

#### **Essential Functions:**

Based on a strong understanding of LIIF's business, and the external environment, the CSO will work closely with the CEO to formulate and update the company's strategy, and then be responsible to develop a comprehensive and cogent plan, comprising branding, communications, fundraising and policy/advocacy activities, all in service of advancing LIIF corporate goals, including increasing LIIF's visibility, commitment to equity, sustainability, and impact.

With five local offices, it will be important for the CSO to coordinate the work of the Corporate Affairs department with all other departments in the implementation of the organization's strategic development, policy and communications plans.

#### **SPECIFIC RESPONSIBILITIES**

##### **Lead External Relationships**

The CSO will:

- Serve as an ambassador for LIIF, representing the company to a range of external stakeholders including supporters, partners, funders, policy makers, elected officials, and with media.
- Develop and implement strategic campaigns to encourage the use of the company's models and learnings by key external organizations, decision-makers and others, strategically positioning LIIF and its leaders as an influencer and resource within the community development industry.
- Identify opportunities to leverage ongoing work to elevate LIIF's priority on social justice and equity into tangible impact in the communities it serves.
- Maximize the use of key senior leaders' time in engagement – and relationship-building activities.
- Form effective high-level relationships with key partner organizations, including those that reinforce LIIF's growing commitment to equity.
- Represent the company at conferences and other public meetings.

##### **Strategic Planning Process**

The CSO will:

- Work closely with the CEO to drive, coordinate, and manage LIIF's multi-year strategic process, coordinating with the organization's leaders, and managing board level presentations.
- Monitor continuously the external environment and industry, tracking trends and issues that may affect the company's strategy and operations.
- Monitor and assess the organization's progress against goals on an annual basis, and to provide board-level reporting.
- Coordinate annual workplans for LIIF divisions that underpin the strategic plan as well.

## **JOB DESCRIPTION**

### **POSITION: CHIEF STRATEGY OFFICER**

---

#### **Lead Fund Development Strategy**

The CSO will:

- Optimize LIIF's current fund-raising program, which encompasses general unrestricted operating grants, program/capital-related grants, and competitive federal, state, and local grant RFPs.
- Alongside the CEO, and working with other senior managers, serve as LIIF's lead fundraiser, generating significant, renewable funding, working in concert with other LIIF leadership in capital / fundraising efforts.
- Oversee the preparation of LIIF's annual fundraising plan for national and regional funding needs with established revenue goals, strategies, and timelines for reaching fundraising goals.
- Serve as a key steward and liaison for major donors and funders.

#### **Social Justice & Equity**

The CSO will:

- Serve as the chief external representative for LIIF around its social justice and equity initiatives (SJE), representing LIIF's work, identifying key partners, and tracking best practices in the market.
- Work in partnership with the CAO on this area, who will manage LIIF's internal equity initiatives.
- Manage and ensure deliverables and progress under LIIF's SJE Action Plan.

#### **Policy and Government Affairs**

The CSO will:

- Establish the vision, goals and strategy for LIIF's government, and advocacy efforts, including rationalizing the work to be done by the LIIF policy team, coalitions and membership organizations, and lobbying support. The emphasis will be on leveraging LIIF's programs, lending and other activities to inform and support the broader work of national and DC-based advocacy organizations.
- Identify opportunities to leverage public policy and private industry practice in service of advancing the principles embodied in LIIF's Social Justice and Equity framework.
- Ensure that the policy program will align the company's policy priorities with LIIF's strategic plan.
- Represent LIIF on legislative and advocacy efforts to external audiences, including Capitol Hill office visits.

#### **Communications, Marketing and Public Relations**

The CSO will:

- Develop and oversee implementation of LIIF's external branding, public relations, and related external communication strategy, in alignment with LIIF strategic goals and priorities.
- Lead the Communications team in defining and building an aggressive marketing strategy that ensures consistent institutional messaging and strong branding aligned with LIIF's core values. The strategy will leverage multiple tools, including LIIF's annual reports, social media presence, program and lending initiatives, and website.
- Actively seek opportunities for LIIF to share insights through media, conferences, and other public forums, and serve as primary point-person for all opportunities and requests.
- Provide messaging strategy and support for LIIF senior managers, for public events and other engagements.

## **JOB DESCRIPTION**

### **POSITION: CHIEF STRATEGY OFFICER**

---

#### **KNOWLEDGE, EXPERIENCE, SKILLS, AND ABILITIES REQUIRED**

- 10+ years of non-profit or for-profit development/fundraising and internal/external communications experience.
- 5+ years of executive level experience, including team management.
- Experience strongly preferred in one or more of: working within an organization with a national/regional dynamic; community development work, and corporate social responsibility.
- Experience with communications, marketing, and/or government relations required.
- Demonstrated track record of success with institutional fundraising.
- Demonstrated experience building or strengthening the structures, supports, and teams required to support a high-performing development team.
- Commitment to recruiting, mentoring, training, and retaining a diverse team experience managing remote teams is helpful.
- A commitment to and experience with institutional / community equity work.
- The ability to operate with flexibility, creativity, but with accountability while maintaining respect for others' concerns.

#### **Strategic Thinker**

- A strategic leader who can influence an organization at all levels and build consensus towards achieving its vision and goals.
- Able to articulate a vision and translate it to various stakeholders, internally and externally, while inspiring their understanding, ownership and support.
- Holds genuine personal commitment to LIIF's mission, and organization's core values of equity, diversity, excellence.

#### **Exceptional Communication Skills & Constituent Builder**

- Possesses top notch communication skills, both written and oral.
- Has the passion and skill to compellingly communicate LIIF's vision and mission to funders, communities and partners
- Exhibits the necessary degree of personal and professional confidence, as well as presence, to guide the fundraising activities of the CEO, senior staff and Board of Directors.

#### **Collaborative**

- Demonstrated ability to work in a team environment, build consensus and problem solve.
- High desire to work collaboratively with colleagues.

#### **Other**

- Ability to manage significant travel for business, as required. (50%)
- Bachelor's degree required. Advanced degree / equivalent experience preferred in business administration, finance, real estate, community or economic development. Experience or expertise on issues of racial equity and the intersection of social justice and community economic development preferred.

## JOB DESCRIPTION

### **POSITION: CHIEF STRATEGY OFFICER**

---

#### **LIIF's Social Justice and Equity Statement**

*Social justice and equity are a lens, a value, a process and an outcome we seek to achieve. Achieving equity and justice requires an inclusive approach, empowering people, connecting with communities and transforming the systems that allocate power and resources in order to create communities where all people have equitable access to opportunity.*

*LIIF's mission is poverty alleviation. Our impact pathways and program strategies are guided by a North Star, which holds that all people, no matter the circumstances of their birth, should have a chance to contribute their full potential to our nation's well-being and to participate in our prosperity. We seek to use LIIF's resources, programs, partnerships and collective voice toward this end.*

*In our workplace, we strive to create a culture of inclusion that enables all employees to do their highest and best work to advance LIIF's mission. We aim to have a workplace that embraces diversity in every way: race, gender, gender expression and identity, culture, ethnicity, religion, color, age, disability, sexual identity, sexual orientation, opinions and world views. We use these values as a lens through which we encourage our policies and practices to be formed.*