



POSITION SPECIFICATION

**CHIEF FINANCIAL OFFICER/  
CHIEF OPERATING OFFICER**  
San Diego Natural History Museum: The Nat  
San Diego, CA

**Leadership Search Partners**

is a search firm focused exclusively on the nonprofit sector. Based in the San Francisco Bay Area, the firm works with local, national, and international nonprofits to help them hire exceptional senior-level leaders.

**Principal and Search Consultant Heather Merriam**

is leading this search assignment. Inquiries may be made, in confidence, to Heather Merriam at [Heather@leadershipsearch.com](mailto:Heather@leadershipsearch.com).



**TITLE:** Chief Financial Officer/Chief Operating Officer

**ORGANIZATION:** San Diego Natural History Museum: The Nat

**LOCATION:** San Diego, CA

**REPORTS TO:** Chief Executive Officer

### **MISSION**

The mission of The Nat is to interpret the natural world through research, education, and exhibits; to promote understanding of the evolution and diversity of southern California and the peninsula of Baja California; and to inspire in all a respect for nature and the environment.

### **ABOUT THE ORGANIZATION**

Founded in 1874, the San Diego Society of Natural History is the oldest scientific institution in southern California, and the third oldest west of the Mississippi. In its initial years, the Society was the region's primary source of scientific culture, serving a small but growing community eager for information about its natural resources. Early society members established a weather station, petitioned to create Torrey Pines State Reserve, and garnered support for the new San Diego Zoological Society, now known as San Diego Natural History Museum (The Nat).

The Nat aspires to be the premier collections-based environmental education and natural history research resource in the region by providing programs that are timely, user-friendly, and relevant to the real-life needs of the diverse populations of the San Diego-Baja California region today and tomorrow. The Nat endeavors to do this by:

- Emphasizing this unique and diverse region while maintaining a global perspective;
- Collecting and preserving scientific specimens for research and as a continuous record of the changing world for future generations;
- Serving as a center for the scientific study of biological diversity and evolution;
- Providing dynamic leadership in natural history and environmental education through exhibits, publications, and educational programs, striving to make this outreach relevant to all the people of the San Diego region; and
- Fostering cooperative efforts in natural history research and education throughout the region.

The Nat is located in Balboa Park, home to more than 17 museums, multiple performing arts venues, beautiful gardens, trails, and many other creative and recreational attractions, including the San Diego Zoo. The Nat is a member of the Balboa Park Cultural Partnership, which is a collaboration of 26 arts, science, and culture institutions in Balboa Park.



## ABOUT THE OPPORTUNITY

Reporting to the CEO, the CFO/COO is expected to be a leader and strategic business member of the executive team, responsible for advancing The Nat's overall financial health and well-being. The CFO/COO will be responsible for financial management and operations, including strategy and innovation, and administrative policies and procedures. The CFO/COO will directly supervise the Directors of Finance, Human Resources, Building Operations, Information Technology, Visitor Experience, and Administrative Services.

The CEO is seeking a strategic thought partner to review, analyze, develop, and promote the Museum's diverse revenue streams, build upon a positive organizational culture, and proactively maintain the physical plant infrastructure. As a key member of the Museum's executive management team, the CFO/COO will work directly with the Board of Directors and the Finance, Investment, Building, and Audit Committees.

This position requires a financial and operational leader with an excellent record of outstanding professional service and accomplishment. This is an excellent opportunity for an analytical, entrepreneurial professional who would like to lead a venerable organization to even greater success. The ideal candidate will come with exceptional interpersonal skills and a collaborative management style that facilitates interactions with colleagues and external entities.

Furthermore, s/he will have both a strategic and hands-on approach to finance, accounting, and operations; be adept at analysis, business planning, and forecasting; and be committed to The Nat's mission.

## Responsibilities

### Major Areas of Accountability:

- **Strategy, Vision and Leadership** Act as a strategic business partner with the CEO and other senior staff to provide advice on lines of business, financial operations, budgeting, cash flow, and policy matters. Serve as a leadership liaison to the Board of Directors by presenting critical financial and administrative operations information. Develop and implement short- and long-range finance and operations goals, objectives, policies, and procedures. Evaluate potential business partners and revenue streams for cost benefit and return on investment, using triple bottom line analysis.
- **Team Development/Leadership** Provide positive, optimistic leadership and problem solving in alignment with The Nat's values. Initiate change management activities in alignment with CEO and strategic directions. Mentor and develop staff, using a supportive and collaborative approach, assign accountabilities, set objectives, establish priorities, and monitor and evaluate results. Represent the Museum to financial and operations partners, including financial institutions, donors, auditors, insurance, public officials, and contractors.

- **Fiscal and Administrative Operations** Oversee and lead all major finance and administration through changes that allow The Nat to diversify and adapt its lines of business. Proactively develop financial metrics for use in decision making. Remain up-to-date on audit best practices and state and federal laws applicable to nonprofit organizations. Develop, coordinate, and execute financial and operational policies and procedures; recommend and implement systems to improve Museum operations; and provide for the successful integration of museum-wide activities.
- **Building Operations, Administration, Visitor Services, Information Technology, and Human Resources** Oversee the operations of the building, support staff, and security functions to ensure safety and comfort of visitors, employees, and volunteers, as well as the preservation of museum collections. Work with the Director of Visitor Experience to ensure a positive, customer service-oriented experience for all visitors. Pursue energy savings, waste reduction, and other “green” projects where applicable to museum operations. Oversee operation of information technology function and develop priorities regarding investments in its infrastructure and cybersecurity. Work with museum staff, contractors, and the City of San Diego to ensure that the building is well maintained and that major systems are functioning smoothly and efficiently. Oversee Museum’s human resources function to ensure compliance with the Museum’s employee manual and all state and federal labor laws. Work with executive management on hiring decisions, succession planning, employee retention, and maintaining a diverse and excellent organizational culture.
- **Business Ventures** Create and monitor business plans for current and future museum earned revenue, including consulting services, food and beverage service, special event rentals, museum store, and educational and public programs. Monitor and report profit (loss) for revenue streams. Create and supervise implementation of systems, policies, and procedures for business ventures.

## Professional Experience/Qualifications

### Experience:

- A minimum of 10 years senior leadership experience in finance and administration with broad expertise in business management
- Experience as a proven senior executive in an organization of comparable size and complexity; evidence of vision and collaboration as well as a service and entrepreneurial orientation in developing progressive business policies and practices
- Proven professional experience in finance, accounting, contracts, budgeting, and cost control principles including GAAP, automated financial reporting, and the MS Suite
- Professional history which includes both non-profit and for-profit preferred
- Museum experience is a plus but not required



Skills:

- Ability to lead effectively across many departments and levels in the Museum, encouraging collaboration in decision making; a proven team player
- Excellent interpersonal and conflict resolution skills with experience collaborating in a multi-disciplinary, diverse, and dynamic team; values diversity of thought, backgrounds, and perspectives
- Demonstrated resourcefulness in setting priorities, proposing new ways of creating efficiencies, and guiding investment in people and systems
- Technologically savvy, with demonstrated ability working with IT staff to develop and implement new processes and systems that increase efficiencies and use best practices
- Excellent communication skills in the service of advancing strategic goals and objectives in the finance and administration arenas

Personal Characteristics:

- Highest standards of personal and professional excellence and unquestionable integrity and ethics
- Positive, optimistic attitude towards problem solving
- High emotional intelligence including self-awareness, emotion regulation, and excellent social navigation skills
- Forward thinking, strategic; embraces innovation
- Demonstrated alignment with the values and mission of The Nat
- A continuous learner who is open to feedback and personal change
- Outstanding interpersonal skills, including listening and empathy

Education:

- Master's Degree in a field closely related to the position; MBA preferred

**COMPENSATION**

A competitive compensation and benefits package will be made available to the qualified candidate.

**TO APPLY**

Leadership Search Partners is conducting this search on an exclusive basis on behalf of The Nat. Interested candidates should apply via email by sending a letter outlining qualifications, brief bio, and resume as PDF or Word documents to Stacey Konner at [Stacey@leadershipsearch.com](mailto:Stacey@leadershipsearch.com) with "The Nat-CFO/COO" in the subject line.

Inquiries may be made, in confidence, to Principal and Search Consultant Heather Merriam at [Heather@leadershipsearch.com](mailto:Heather@leadershipsearch.com) or 510-542-2922.



### **EQUAL EMPLOYMENT OPPORTUNITY**

It is the policy of the Museum to provide equal opportunity in employment for all persons and to prohibit discrimination based on race, sex, sexual orientation, gender identity, color, religion, ancestry, national origin, citizenship, marital status, veteran status, military service, medical condition, physical or mental disability, genetic information, age or other legally protected characteristics in every aspect of personnel policy and practice in employment, development, advancement, and treatment of employees.

**LEADERSHIP SEARCH PARTNERS** is a search firm focused exclusively on the nonprofit sector. Based in the San Francisco Bay Area, the firm works with local, national, and international nonprofits to help them hire exceptional senior-level leaders: [www.leadershipsearch.com](http://www.leadershipsearch.com).