

**FLORIDA STATE COLLEGE AT JACKSONVILLE
JOB DESCRIPTION, 2023**

CHIEF INVESTMENT OFFICER & ADVANCEMENT RELATIONS

FLSA STATUS: EXEMPT – PAY GRADE: 27-A

JOB FAMILY: FISCAL SERVICES JOB FUNCTION: BUSINESS SERVICES

GENERAL STATEMENT OF JOB

The Chief Investment Officer (CIO) & Foundation Community Relations Officer reports to Vice President Advancement & Executive Director for the Foundation provides long-range, strategic, and operational leadership for managing the Foundation's investment portfolio and cash management operations. Critical to the Foundation's effectiveness, this position has daily responsibility for administration and oversight of the Foundation's investments and cash management, and consults with the Foundation's Investment Advisory Committee and Finance Committee of the Board of Directors on matters relating to the investment and management of the Foundation's financial assets. The CIO serves as the main liaison and primary contact for the Foundation's investment managers, investment consultant, custodian, and Investment Committee.

Because of the nature of this position, the CIO will have a role in community relations activities at the direction of the Vice President Advancement & Executive Director for the Foundation to assist in the identification, cultivation, solicitation and stewardship of major gift donors (alumni, friends, corporations and foundation).

CHARACTERISTICS, DUTIES AND RESPONSIBILITIES

Ensures the financial assets supports the mission and strategies of the Foundation.

Researches, selects, monitors, and terminates investment managers, and provides leadership, guidance, analysis and support to the Foundation's Investment Advisory Committee and the Foundation Committee.

Utilizes risk management models, analyzes budgetary limits, and predicts how much money will be required to allocate assets to meet FSCJ and Foundation goals and complete projects.

Evaluates potential investment opportunities and makes recommendations about the various investment options.

Implements an approved asset allocation model for the portfolio, with the approval and direction of the Investment Advisory Committee.

Prepares investment strategies and creates highly effective investment plans that positively impact the Foundation.

Maintains the Foundation's investment and cash management policies.

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Prepares financial reports and financial models to predict potential cash inflows.

Maintains strategic relationships with community partners in support of current and potential donors per the direction of the Vice President Advancement & Executive Director for the Foundation. Inputs and maintains contact reports in Raiser's Edge donor management software.

Performs duties supporting the creation and maintenance of financial resources for students and institutional needs.

Performs related duties, as required.

SUPERVISION RECEIVED

Supervision is received from the Vice President Advancement & Executive Director for the Foundation.

SUPERVISION EXERCISED

Supervision is exercised over assigned staff.

MINIMUM QUALIFICATIONS

Bachelor's degree in accounting, finance, economics, or business-related field from an accredited institution and five (5) years of significant investment analysis, return generation strategies, financial reporting, and portfolio management related experience.

PREFERRED QUALIFICATIONS

Master's degree in business administration. Extensive experience with a broad array of asset classes, identifying and screening alternative investment opportunities, portfolio construction process, and performing due diligence.

Certification as a Chartered Financial Analyst (CFA).

**MINIMUM QUALIFICATIONS OR STANDARDS REQUIRED
TO PERFORM ESSENTIAL JOB FUNCTIONS**

Physical Requirements: Must be physically able to operate a variety of machines and equipment including mainframe and personal computers, equipment, and related peripherals, and modern office. Tasks may require ability to lift, carry, push and or pull objects of light weight (12-20 pounds). Tasks may require extended periods of time at a keyboard or workstation.

Data Conception: Requires the ability to compare and/or judge the readily observable, functional, structural or compositional characteristics (whether similar to or divergent from obvious standards) of department records, documentation, figures, financial and reporting systems, and related equipment.

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Interpersonal Communication: Requires the ability to speak and/or signal people to convey or exchange information. Includes issuing and receiving assignments, instructions, and/or directions.

Language Ability: Requires ability to read standard English, as well as technical data, policy and procedure manuals, codes, etc. rendered in moderately complex terminology. Requires the ability to prepare forms and reports using prescribed formats. Requires the ability to adhere to accepted standards of business English, i.e., format, style, grammar, spelling, punctuation. Requires the ability to communicate with a broad array of individuals from various backgrounds.

Intelligence: Requires the ability to apply principles of logical thinking to define problems, collect data, establish facts and draw valid conclusions; to interpret a variety of instructions or inquiries furnished in written and/or oral form; to acquire knowledge of topics related to occupation.

Verbal Aptitude: Requires the ability to record and deliver information, to explain procedures, and to follow oral/written instructions. Must be able to communicate effectively with the public, faculty, and staff under charge.

Numerical Aptitude: Must be able to add, subtract, multiply and divide; calculate decimals and percentages; compute discount, profit and loss, ratio and proportion; interpret graphs.

Form/Spatial Aptitude: Requires the ability to inspect items for proper length, width and shape, and visually read various information.

Motor Coordination: Requires the ability to coordinate hands and eyes accurately in operating modern office equipment and machinery.

Manual Dexterity: Must have minimal levels of eye/hand/foot coordination.

Color Discrimination: May require the ability to differentiate between colors and shades of color.

Interpersonal Temperament: Requires the ability to deal with people beyond receiving instructions. Must be adaptable to performing under occasionally high levels of stress, imposed by frequent deadlines, peak workloads, or staff contact.

Physical Communication: Requires the ability to talk and hear: (talking: expressing or exchanging ideas by means of spoken words; hearing: perceiving nature of sounds by ear).

Environmental Requirements: Tasks are regularly performed without exposure to adverse environmental conditions (e.g., dirt, cold, rain, fumes).

Effective: 12/6/23