



## Director of Finance, Administration, and Systems for Capital Access, Inc. and CAPGEMS, LLC

January 2026

### Position Summary

The Director of Finance, Administration, and Systems (DFAS) is accountable for the accuracy, reliability, and scalability of all financial, administrative, and enterprise systems for Capital Access, Inc. and its affiliate, CAPGEMS, LLC.

The Director reports directly to the Chief Executive Officer, collaborates closely with the Chief Operating Officer, and is a full member of the management team. The DFAS is responsible for the financial and administrative infrastructure that enables predictable operations, compliant growth, and sustained profitability. The DFAS ensures that financial, administrative and systems support execution by delivering timely, accurate financial and operational information.

- Accurate and timely financial reporting across both entities
- Sound financial management that supports profitability and cash flow
- Scalable administrative, human resources, and information technology systems
- Audit readiness and compliance with federal, state, and local requirements
- Clear ownership, supervision, and performance management of finance, bookkeeping, and contract management staff

### Organizational Context

Capital Access, Inc. is a national consulting and program management firm specializing in housing, community development, and energy retrofit programs. Since 2000, the U.S. Department of Housing and Urban Development has engaged Capital Access as a national Technical Assistance provider. Capital Access supports federal, state, and local governments by designing programs, providing implementation guidance, and developing compliance and financial management tools. CAPGEMS, LLC is an affiliated company that implements Whole Home Performance programs as a Program Manager and Prime General Contractor.

Both entities operate within a shared, standardized operating environment supported by the Capital Access Project, Grants, and Expenditure Management System, enabling integrated delivery and growth across advisory and implementation activities nationwide.

As these activities scale nationally, the Director of Finance, Administration, and Systems plays a critical role in ensuring that financial, administrative, and enterprise systems function seamlessly across both entities, support compliance requirements, and enable disciplined, sustainable growth. The ideal candidate embraces our core values to be:

- Proactive
- Discerning
- Integrity-Driven
- Collaborative
- Innovative
- Kind
- Accountable

Helping communities heal and thrive.

This role supports the organization's ability to scale in a deliberate and well-managed manner, with strong financial controls, timely reporting, and sustainable margins. Success is reflected in stable operations, reliable information, and systems that enable leadership and program teams to focus on delivery and impact.

**You may be a great fit for this position if you....**

- Take pride in building solid financial, administrative, and reporting systems.
- Enjoy translating complex financial and compliance requirements into clear processes.
- Bring structure and clarity to fast-moving, entrepreneurial environments.
- Lead and develop accounting, bookkeeping, and contract management teams with clarity, accountability, and steady expectations.
- Demonstrate steady leadership in audit, compliance and deadline-driven environments, and design systems that promote financial clarity and reliability across the organization.
- Find purpose in supporting programs that improve housing stability, community health, and economic opportunity, while remaining grounded in execution and results.

**Key Responsibilities**

*Finance and Accounting*

- Lead and supervise all accounting, bookkeeping, and financial reporting staff and systems.
- Ensure financial statements are accurate and delivered on schedule.
- Maintain internal controls, chart of accounts, and reconciliation standards.
- Manage cash flow forecasting, accounts receivable, accounts payable, and expense controls.
- Provide margin, project-level, and overhead analysis to support executive decision-making.

*Contracts, Compliance, and Audit*

- Supervise contract management staff responsible for financial terms, invoices, and compliance.
- Prepare financial documentation for audits, tax filings, HUD Indirect Cost Rate, and monitoring.
- Ensure compliance with 2 CFR Part 200 and related federal requirements.
- Maintain audit readiness as a standing operating condition rather than a periodic exercise.

*Administration, Human Resources, and Systems*

- Own and continuously improve administrative, human resources, payroll, benefits, and information technology systems.
- Manage staff, vendors and subject matter experts (SMEs) supporting finance, HR, IT, and administrative functions.
- Ensure administrative systems scale effectively with increased program volume and staffing.
- Maintain clear, documented policies and procedures.

*Entrepreneur's Operating System (EOS) Leadership and Cross-Functional Coordination*

- Participate actively in EOS L10 meetings, quarterly planning, and scorecard reviews.
- Translate financial and administrative data into clear, actionable insights for the management team.
- Collaborate with the COO to support operational throughput, cost management, and margin performance through clear financial insight and well-designed systems.

### Required Qualifications

- Demonstrated experience leading finance, accounting, and administrative systems in a growing organization.
- Experience supervising accounting, bookkeeping, and contract management staff.
- Strong proficiency with QuickBooks Online, payroll, and timekeeping systems
- Capability to evaluate new accounting systems as the firms grow.
- Advanced Excel skills and experience with Smartsheet or similar tools preferred.
- Experience with government-funded programs and compliance with 2 CFR Part 200.
- Familiarity with EOS accountability tools and operating cadence.
- Exceptional organizational, analytical, and communication skills.
- High integrity, discretion, and reliability.

### Compensation and Benefits

- Full-time, exempt, at-will position.
- Competitive compensation is aligned with experience and expertise.
- Performance-based bonuses are tied to profitability and impact metrics.
- Eligible for health, dental, vision, and retirement benefits.

### Work Environment

Capital Access and CAPGEMS, LLC are remote firms. The CEO and COO are based in Philadelphia. This position may involve quarterly travel for team coordination and partner engagement. Additional travel may be required on an as-needed basis.

### Contact

Candidates with the above skills and experience are encouraged to submit your resume, cover letter and three references to [klee@tocgrp.com](mailto:klee@tocgrp.com).

All duties and responsibilities listed are essential job functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. The omission of specific duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.

Hiring Firm is an Equal Opportunity Employer. Candidates will be considered regardless of race, color, religion, sex, national origin, age, sexual orientation, protected genetic information, status as a parent, lawful political affiliation, marital status, physical/mental disability (beyond what is required for successful job performance), membership or non-membership in an employee organization, or any other non-merit factor.

Hiring is contingent upon satisfactory results of employment and background verification. This job description does not constitute an employment agreement and is subject to change by the employer as the needs of the business and requirement of the job change. Hiring Firm reserves the option to request examples of work product, proficiency exercises and more information as needed. To support mutual alignment and long-term success, Hiring Firm may invite finalists to complete a professional strengths or behavioral assessment.

**Thank you for your interest.**