



Philanthropic Advisor - Tao Capital Partners LLC

San Francisco, CA

January 2019

The Opportunity

Tao Capital Partners LLC, a San-Francisco-based family philanthropy and investment entity, is seeking a Philanthropic Advisor. The Philanthropic Advisor role is a unique opportunity to work intimately and collaboratively with members of this multi-generational family to further refine each family members' philanthropic interests and engage in grantmaking through various donor-advised funds (DAFs).

[Tao Capital Partners LLC](#) is the umbrella organization for family's philanthropic work and complementary investments. Tao Capital Partners includes various donor-advised funds, as well as the [Libra Foundation](#), a separate family foundation with an endowment of approximately \$300 million endowment. The Foundation utilizes a human rights lens to focus its grantmaking within and at the intersection of three program areas: gender justice, environmental justice, and criminal justice reform/drug policy. The Philanthropic Advisor position is based at Tao Capital Partners offices in The Presidio, and reports to the Director of Philanthropy.

The firm is a small, intimate environment where culture fit, shared values and perspective are very important. The ideal candidate should be: 1) an experienced philanthropic advisor with prior experience working directly with high net worth individuals and donor-advised funds; 2) a generalist with knowledge of the SF Bay Area and non-profit and philanthropic sectors, and ideally, experience in one or more content areas that overlap with the family's philanthropic interest areas; 3) a superb project manager and quick study with excellent skills in strategy, planning, execution/implementation, writing and communications; and 4) a down-to-earth, adaptable and flexible individual with exceptional people skills and emotional intelligence.

Key Responsibilities

- Collaborative Strategy. Work closely with family members to identify individual and collective areas of philanthropic interest for grantmaking through donor-advised funds.
- Thought partner. Serve as thought partner and information resource for family members on their philanthropy and related work. Initiate and respond to requests for relevant research and insight. Collaboratively consider potential approaches and identify organizations to support.
- Emerging issues and trends. Track and stay current on emerging issues and trends in donors' areas of interest.

- Project and resource management. Develop and lead DAF-related projects in partnership with others in the nonprofit, social, public and philanthropic sectors. Determine the need for outside consultants and other resources, and also determine the most effective and efficient way to manage specific initiatives or projects.
- External relationship-building and partnerships. Invest in relationships with key non-profits in the SF Bay Area and institutions and leaders in relevant fields. Identify new, emerging and innovative organizations doing groundbreaking work in areas of interest to the family.
- Public policy. Identify relevant public policy issues and potential paths for involvement and impact.
- Funding/grants management. Identify funding opportunities in line with each family members' strategic goals. Engage in a process to evaluate potential grantee organizations. Maintain relationships with grantees or other organizations. Prepare reports for family members through the life-cycle of the investment.
- Investment management. Collaborate with investment and family office staff as needed if and when there are investment approaches that complement the DAF strategy.
- Evaluation. Devise and execute effective strategies and methods for evaluating the success and impact of grants and investments.

Qualifications

- Seven to ten plus years of experience as a funder or guiding funders/donors.
- Mission-oriented with a proven commitment to social impact.
- Prior experience working with high net worth individuals and their spouses/partners.
- Experience participating in the management of DAFs and/or philanthropic operations, systems, and grant programs preferred.
- Extensive experience in or with the nonprofit sector also highly desirable. Strong network and deep knowledge of the SF Bay Area non-profit and social sector strongly preferred.
- Strong knowledge of the philanthropic sector and philanthropic giving vehicles, as well as the various laws and regulations affecting them.
- Solid social sector knowledge, including strategy, theory of change, program design, evaluation/performance management, business models, capacity-building, etc.
- Excellent customer service and communication skills (listening, interpersonal, verbal, and written); responsive, thoughtful and timely.
- Excellent writing, research, synthesizing and presentation skills.
- Strong planning and implementation skills; ability to prioritize, organize, and manage multiple competing assignments and responsibilities.
- Proven ability to work collaboratively with many constituencies.
- Ability/comfort level to work with a broad cross-section of individuals from the community.
- Willingness to travel occasionally.

Additional Attributes

Successful candidates will also exemplify the following:

- High EQ. Thoughtful, open-minded listener and thought partner with high emotional intelligence.
- Excellent communicator. Highly developed skills in synthesizing ideas across fields and sectors, and in writing, speaking and facilitating.
- Flexible and positive. Demonstrated work style that is flexible, humble and adaptable. Must have a positive attitude that inspires confidence and action.
- Collaborative yet independent. Collaborative with experience supporting and leading teams, while also being comfortable working independently and being resourceful and accountable.
- High integrity. Impeccable reputation for integrity and judgment; models ethics and trustworthiness in all actions. Personal and professional maturity. Ability to maintain confidentiality, discretion, credibility and trust.

Compensation

Salary is competitive and commensurate with background and experience, and a generous benefits package is offered.

To Apply

[Martha Montag Brown & Associates, LLC](#) has been retained for this search. Interested and qualified candidates are encouraged to apply by sending a cover letter, resume and salary requirements by email to Martha@marthamontagbrown.com. All correspondence will remain confidential.