



**THE 360 GROUP**  
— EXPECT THE UNEXPECTED —

# Kataly Foundation

## Director of Finance and Operations

### Position Description & Candidate Profile

# Director of Finance and Operations

## Location

San Francisco, CA

## Reports to

Chief Executive Officer

## Our Client

The Kataly Foundation, a new family foundation based in the San Francisco Bay Area, is committed to supporting restorative economics, environmental justice, and mindfulness and healing. At this inaugural moment, the foundation is seeking to build its team beyond its new CEO and Director of Communications by adding to crucial infrastructure that will serve the foundation's programs and grantees in the ways the donors intend.

Kataly's mission is to support and provide resources to communities and social movements that are exploring new solutions to persistent, systemic problems, while embracing its role and responsibility in changing the systems that led to wealth extraction from these communities in the first place.

The Kataly Foundation moves resources to support the economic, political, and cultural power of Black and Indigenous communities, and all communities of color. By transforming its own relationship to capital, the planet, and each other, the Kataly Foundation will redistribute and redefine wealth in a way that leads to transformation, abundance, and regeneration. Kataly's intention is to be a partner that supports solutions, leading to lasting regeneration that transforms us all.

## Position Responsibilities

The Director of Finance and Operations will be a key strategic and management partner to the CEO and will oversee and execute the operational functions of the organization, including its grants management processes, financial systems, and human resources functions through partnerships and/or with internal staff.

The successful candidate will have a high degree of maturity, personal integrity, and interpersonal skills, and will be extremely self-motivated and comfortable in a young, growing organization. S/he must excel in managing budgets, financial projections, accounting and operations as well as have experience with developing an organization's workflow, internal communications, and processes. The

organization and the position are highly collaborative in nature; strong candidates will possess an exceptional ability to listen and foster collaborative innovation amongst diverse stakeholders. The Director of Finance and Operations will report to the CEO.

Specifically, the Director of Finance and Operations will:

#### *Management and Operations*

- Take initiative on operational matters and manage all business activities to ensure that the foundation is operating efficiently and effectively
- Assess the foundation's operational needs and create and implement a work plan, identifying tools and platforms to meet those needs
- Manage relationships with key partners including the family office for foundation administration, administrators for grant processing, fiscal sponsors for affiliate projects, and other consultants for technical assistance and grantee partner capacity building
- Oversee the maintenance of a thorough organizational calendar and coordinate team meetings with staff and consultants
- Supervise relevant administrative staff and ensure clarity of roles and expectations throughout the organization
- Serve as a thought partner to colleagues across the foundation
- Supervise the foundation's human resources specialist to ensure that payroll, benefits, recruitment and hiring processes, compensation packages, performance management programs, and overall HR policies are aligned with the foundation's goals
- Effectively manage the foundation's infrastructural requirements, including appropriate information technology and work environments in the Bay Area and for remote employees in other locations

#### *Finance, Legal Compliance, and Grants Management*

- Oversee and support the full range of financial and accounting functions including financial planning, reporting and analysis, accounting, tax, budget planning, payroll, procurement, consultant and vendor contracts, control and risk, and year-end audits, either through an outside partner or with internal staff
- Maintain a good working relationship with the team that provides accounting and other back office support to the foundation
- Assess and lead an effort to improve the current workflow processes, technology platforms, and data management systems behind the foundation's grantmaking

- Manage the foundation's legal affairs, interfacing with external counsel when necessary to ensure the foundation complies all local, state, and federal regulatory requirements
- Develop a risk management approach that is appropriate for the foundation's scale, mission, and exposures and that enables effective oversight by the board

#### *Information Technology*

- Bring vision and project management to an IT structure that will increase the overall efficiency and effectiveness of the organization
- Oversee planning, budget, deliverables, and timelines to ensure systems selection and implementation match expectations
- Lead discussions and considerations pertaining to IT issues, goals, and decision-making with the executive team, enabling the team to balance IT resource needs within an organizational context
- Work with the IT consultant to develop and manage relevant technology issues
- Develop and maintain best systems and practices for data security and employee and consultant confidentiality

#### *Administration/Management*

- Model and instill a collaborative approach that inspires a professional staff comprised of human resources, IT, facilities, and administration departments
- Use strong organizational planning skills to implement, document and maintain comprehensive HR, IT, and administrative systems
- Provide contract and vendor negotiation and oversight
- Develop and maintain contracts that align with federal and local employment laws pertaining to employees and contractors
- Collaborate to plan Board, staff, and other team meetings and retreats, applying the lens of cultural transformation and growth
- Use contemporary management practices to complement and build a healthy organizational culture that emphasizes creating a synergistic team atmosphere

### **Profile of the Successful Candidate**

The Kataly Foundation is deeply committed to justice, equity, diversity and inclusion, and seeks to have a diverse and inclusive workforce to promote effective work in partnership with all communities and population groups. The Foundation seeks a professional with a commitment to the power of philanthropy and the common good; a passion for Kataly's program areas and organizational values; a

collegial work style; a sense of humor; and the dedication to work hard toward fulfilling the foundation's mission of truly empowering communities and moving the needle on critical issues facing our nation.

Within this framework, Kataly Foundation seeks a Director of Finance and Operations with the following attributes:

- 10+ years of experience, including a minimum five years of operational and/or financial management experience in a business or nonprofit organization; foundation experience in creating world-class philanthropy preferred. Under exceptional circumstances, candidates with fewer years of experience will be considered
- Self-starter and self-directed professional who takes initiative, using sound, independent judgement and discretion and seeking guidance and feedback where appropriate—a doer as well as a manager
- Strong analytical and problem-solving skills; highly organized with an attention to detail and a commitment to rigor and excellent work product
- Experience with the financial management of organizations, divisions, or business units, including scaling up organizational infrastructure
- Ability to excel in creating and leading a diverse and energetic staff; ability to motivate individuals and foster team spirit; knowledge of basic human resources issues and experience setting individual and team performance goals and evaluating their execution
- Fluency in finance and accounting, comfort recognizing potential legal issues and working with outside counsel, and ability to develop risk management strategies
- Experience driving business processes and scaling up organization infrastructure to meet evolving expectations, including IT and business processes
- Familiarity with state-of-the-art organizational development and grants management tools
- Excellent verbal, written, analytical, and interpersonal skills
- Strong time management skills and the ability to manage multiple projects simultaneously
- Professionalism, empathy, and the ability to work as part of a team, maintain a sense of humor, and interact with a diverse array of people
- Strong internal service orientation background
- Ability to nurture a highly collaborative and professional environment within the organization
- Strong work ethic and the highest level of personal and professional integrity

Additionally, the successful candidate will likely have:

- Bachelor's degree in management, public administration, finance, accounting, or other related field; MBA, other relevant graduate degree, or relevant professional development certification preferred
- Strong operational and implementation experience, demonstrated through positions that require action, rather than the provision of counsel
- Nonprofit, foundation or philanthropic exposure and/or experience

## Start Timeframe

We seek to have someone in place by Winter 2020.

## Compensation

This position offers a competitive salary and includes a comprehensive benefits package. We actively welcome all candidates from a wide range of backgrounds who have the skills to fulfill this role – regardless of compensation history.

## To Apply

All applications are held in strict confidence. Please submit your credentials and a letter of interest through our private applicant portal to The 360 Group at:

<https://the360group.us/portal/>

Applications should be directed to the attention of Vincent Robinson, Managing Partner, or Monica Rodgers, Senior Consultant. Applications will be reviewed on a rolling basis. Earlier applicants may receive priority consideration. To be considered, The 360 Group encourages all interested candidates to submit their applications promptly, via the confidential applicant portal linked above.

*At The 360 Group, we know that a richly diverse mix of professionals makes organizations more effective. Using that principle as our “North Star,” we make diversity a hallmark of our firm, and all of our search engagements.*

**Learn more about The 360 Group at [the360group.us](https://the360group.us).**