



**November 2020**

**Kalliopeia Foundation Job Announcement  
Director of Finance and Investments**

**About the Foundation**

Kalliopeia Foundation is an independent private foundation dedicated to reconnecting ecology, culture, and spirituality, and supporting initiatives and organizations that uphold a sacred relationship with life on Earth. Over the past twenty years, our commitment to mission-related/ impact investing has grown to almost 100% of our portfolio, with 30% focused on community investing—including Indigenous and POC-run funds—and on organizations working in sustainable agriculture and forestry, affordable housing, community revitalization, and regenerative economy principles with a focus on income, gender and racial equity.

Our own programs include trust-based grantmaking and two in-house education and media initiatives, with a total annual budget of \$11.5M. Through our grants program, we give \$6.5M annually to grantee partners throughout the US, with a focus on cultural and ecological renewal. Our award-winning online publication, *Emergence Magazine*, publishes multimedia stories exploring the threads connecting ecology, culture, and spirituality. And the *Global Oneness Project*, an internationally recognized educational platform, offers educators a free library of multimedia documentary stories and companion curricula to bring the world's cultures alive in their classrooms and plant seeds of empathy, resilience, and a sacred relationship with our planet.

Kalliopeia is located in the San Francisco Bay Area, on the ancestral lands of the Coast Miwok. We have a staff of sixteen, and are governed by a four-person Board of Directors.

**Position Description**

The Director of Finance and Investments (DFI) is a new full-time exempt position with Kalliopeia Foundation, reporting to the Executive Director (ED), and working closely with the Finance Manager/Controller and other Kalliopeia staff, and with input, guidance and approvals from the Kalliopeia Finance Committee (Treasurer, ED, and Board Chair).

This position will ensure that Kalliopeia's investment portfolio and other financial functions are responsibly and ethically managed. Beyond that however, the DFI will make sure that an allotted portion of our investable funds has a positive impact on Indigenous, Black, POC, and other under-served communities by sourcing, managing and monitoring a community-oriented investment pipeline (as opposed to traditional stocks and bonds) in alignment with Kalliopeia's mission. Through our community investing, the DFI will help build a financial network that does more than just lend funds, but that actively and creatively helps shift the narrative to relationship and reciprocity.

Our team is primarily working remotely until conditions become safe to return to the office. When that occurs, ideally this position would be based in the SF Bay Area, but we would be open to other locations within the US. In that case however, regular trips to our office in San Rafael, CA would be expected, as well as the ability to travel throughout the US for meetings and site visits.

## **Responsibilities**

### Investments

This position is responsible for the Foundation's entire investment portfolio, including:

- Managing the relationship with the outsourced investment advisory firm, coordinating new investment recommendations, and monitoring the investments.
- Developing Kalliopeia's mission-aligned investing through our Community Investments portfolio. This is a primary focus for the position and will include sourcing and developing new relationships and opportunities, conducting due diligence, and making recommendations for approval to the Finance Committee.
- Offering guidance and support to our investment partners throughout the life of the investment relationship (e.g. in difficult periods requiring restructuring of loans or other capacity building support).
- Recommending updates as needed to Kalliopeia's Investment Policy Statement, and to the criteria for our community investing, working closely with the Finance Committee.
- Developing a long-term cash management strategy to support the foundation's annual operations and programs budget and payout requirements.
- Coordinating with the Kalliopeia Director of Grantmaking on an integrated capital approach to support Kalliopeia's grantee partners, when appropriate.

### Finance:

- Overseeing the Finance team, and liaising as needed or requested with the ED, Treasurer, and Board.
- Ensuring that regular and accurate financial and investment reports are provided to the Finance Committee and Board, and ensuring open, clear and transparent communication.
- Managing the planning of, and participating in, the quarterly Finance Committee meetings.
- Ensuring the financial integrity of the organization through appropriate controls, and recommending changes as needed to remain strong and accountable.

### Communications:

- Representing the foundation's programs and perspective to investors, organizations, and the public.
- Participating in community calls/meetings, site visits, conferences etc. (virtually until conditions change).
- Becoming a sustained presence within the Community Investing field as a creative connector, convener, introducer, and cross-pollinator.

## **Ideal Experience and Qualifications**

- A passion for Kalliopeia's mission, and a commitment to being in service to the larger community.
- At least 7 years of progressively responsible experience in the impact investing / mission-related investing space, including a broad and deep understanding of investment strategies, and a record of sound judgement, as well as equitable and ethical decision-making. Direct experience with community loan funds, CDFIs, and private equity investments preferred.
- An exemplary record of fiduciary leadership and demonstrated integrity, with a strong background in fiscal management, preferably at a foundation, nonprofit organization, or governmental institution.

- Strong relationship-building and team skills as a connector and convener, especially experience with facilitation and presentation.
- Excellent written and verbal communication skills. Able to engage well with people at all levels within an organization, and to distill investment and financial jargon into simple and relatable terms.
- BSc/BA and Masters in Accounting, Finance, or Business Administration from an accredited university highly preferred, or BSc/BA and Masters equivalent experience.

### **Compensation & Benefits**

Compensation will depend on experience, with a range of \$140K - \$160K. The foundation offers a variety of benefits to employees, including health, vision, and dental; 401K retirement plan; and vacation and wellness/sick leave.

### **To Apply**

Please send a resume and 3 professional references, with a substantive cover letter describing your interest and fit with the qualifications of the position, to Zoë Fuller-Rowell, Executive Director: [apply@kalliopeia.org](mailto:apply@kalliopeia.org). Our intention is to fill this position in the first quarter of 2021, but the position will remain open until filled.

*Kalliopeia Foundation is an equal opportunity employer, all applications are welcome. We especially encourage people from historically disenfranchised groups, including women, people of color and those who identify as LGBTQ+ to apply.*