

solidaire

POSITION DESCRIPTION

Senior Finance & Investments Strategist

Title:	Sr. Finance & Investments Strategist
Position:	Permanent
Schedule:	0.8 FTE, Exempt
Position Reports to:	Executive Director (while Director of Finance and Investments is on Medical Leave)
Updated:	March 2022

Position Summary:

As Solidaire grows in budget size, membership, multi-year movement partnerships and overall complexity, we are seeking to hire an experienced finance and investment professional to guide our financial, funding and investment strategies towards our Theory of Liberation goals and in alignment with our political and funding values. At Solidaire, *Strategists* bring strategic knowledge, extensive sectoral experience and are able to also execute on the specific strategies in alignment with our Theory of Liberation. They may work on multiple projects and manage staff, consultants and contractors as needed.

Essential Functions:

- 1. Financial & Investment Leadership (50%)**
 - Select and manage all socially responsible investments related to Solidaire's reserve fund in line with the Investment Policy Statement, under the direction of the Board's Finance and Investments Committee.
 - Review and improve internal financial and budgeting systems and work with the Finance team to generate strategic reports for the Finance and Investment Committee of the Board and the staff.
 - Coordinate with the internal leadership team to formulate mid and long term strategies, review progress towards Theory of Liberation goals, identify current challenges, and strategies to address them.
 - Work with the leadership team to secure long-term funding for Solidaire Network and Solidaire Action.
- 2. Investment Innovation (30%)**

- Develop an investment strategy in compliance with Solidaire's 501c3 and 501c4 designations while meeting movement-driven mandates.
- Align investment portfolio with Solidaire's movement partners, technical assistance providers and infrastructure partners.
- Source, oversee and perform due diligence on integrated capital projects and organizations in deep collaboration with the movement partnerships and grantmaking team.
- Partner effectively with Solidaire's donor organizing and movement partnerships teams to build internal capacity to engage with non-traditional capital in service of movement building.
- Manage consultants as needed to advance this body of work.

3. Learning, Experimentation, and Collaboration (20%)

- Collaborate with movement partnerships and grantmaking team to embed Solidaire's learning and evaluation frameworks, including but not limited to, conducting regular 1:1s with partners and preparing bi-annual reporting on partnership and project development related to investment capital
- Along with all other staff, this position contributes to Solidaire's culture of entrepreneurship, teamwork, and continuous learning and does what it takes to ensure that Solidaire staff collaborate and support each other.

Note: Solidaire is committed to responding flexibly to changing circumstances and priorities which means that the expectations of every position are dynamic. This description reflects the assignment of essential functions but does not proscribe or restrict the tasks that may be assigned.

KNOWLEDGE, SKILLS, AND ABILITIES: Alignment with the vision and values of Solidaire Network including a strong racial, gender, class, environmental/social justice lens; Master's degree in accounting, finance or business or equivalent experience as CPA or CFP; At least 8 years of experience working in social justice philanthropy, grassroots, base building organization and/or at least 5 years of experience working in finance, accounting and impact investing with companies/ organizations/networks that advance social, racial, economic and/or climate justice in the United States; Proven experience in non-profit finance and impact investing; Strong facilitation skills; Grounded and flexible with a high degree of integrity, transparency, and collaborative ability; Impeccable financial, verbal and written communications skills; Able to pay close and consistent attention to details and accuracy; Strong proficiency with research, data collection, data management, review, analysis, documentation and reporting; Ability to work on a virtual team, in particular, and juggle multiple projects at once; Demonstrated reliability, flexibility and follow-up; Deep commitment to relationship building, team building and strategic action.