



Vice President of Finance and Operations Position Description

About the Evelyn and Walter Haas, Jr. Fund

The Evelyn and Walter Haas, Jr. Fund works to advance equality and justice so every person can thrive and live life with dignity and hope. Rooted in the Bay Area, the Haas, Jr. Fund is guided by an enduring set of core values. These values reflect the founders' vision and shape everything the Haas, Jr. Fund does.

- **Inclusion:** We celebrate the rich differences in human identity and embrace the perspectives of all people.
- **Respect:** We are guided by the wisdom and voices of people and communities working for change.
- **Collaboration:** We believe in the transformative power of working together to advance a shared vision.
- **Courage:** We take a stand to make a deep and lasting difference on urgent social issues.

The Haas, Jr. Fund focuses on a set of issues we believe are at the core of advancing equality and opportunity in our home state of California and the broader society: Democracy, College Success, Immigrant Rights and LGBT Equality. For more information, visit us online at haasjr.org. The Haas, Jr. Fund has a full-time staff of 20 professionals and assets of approximately \$475 million. Located in downtown San Francisco, it has awarded over \$650 million in grants since its founding in 1953.

The Haas, Jr. Fund aspires to build an organizational culture that is inclusive and that allows all of us to live and breathe our values and lean into the Haas, Jr.'s core strengths. We believe deeply in our staff members, we take care of each other, and we work to develop our colleagues' skills and help them grow. We collaborate to lift up good ideas and diverse perspectives while embracing innovative solutions. We work with passion and gratitude for the chance to make a positive impact and change people's lives.

About the Vice President of Finance and Operations Position

This is a unique opportunity for an experienced leader to lead financial and operational strategy for a mission-focused foundation working at the intersection of many pressing issues facing California and the nation today. In all of Haas, Jr.'s work, the driving question is around impact.

More specifically, we want to make sure our grants and our “more than grantmaking” activities are resulting in real improvements in the lives of people. The Vice President of Finance and Operations (VP) plays a critical leadership role in caring for and developing the talented and dedicated Haas Jr. staff team and ensuring the long-term financial and operational viability of the foundation. The VP provides leadership and management direction to the investment, accounting, finance, legal, human resources, information technology and facilities management functions of the Haas, Jr. Fund.

The Vice President of Finance and Operations reports directly to the president and CEO. The VP is a core member of the organization’s executive leadership team.

Areas of Responsibility

The Haas, Jr. Fund has identified three primary roles for the Vice President of Finance and Operations: Financial Investments and Management; Core Operations; and Organizational Development and Culture. Five of the foundation’s 20 employees are managed by the Vice President of Finance and Operations and also include key outsourced partnerships with HR, legal, etc. The VP is responsible for overseeing Haas, Jr.’s work across three primary areas of responsibility as follows:

1. Financial Investments and Management. The VP oversees all investments, finances and fiduciary stewardship. The position carries significant discretionary authority, including budgetary authority. There are two important components of this area of responsibility: Investment Oversight and Financial Management.

Investment Oversight

- Oversee all investments and ensure that the Haas, Jr. Fund’s portfolio is invested in ways consistent with organizational goals and key performance objectives.
- Partner closely with the outsourced Chief Investment Officer (OCIO) on stewardship of the foundation’s investment portfolio including oversight of long-term strategy, investment returns, and portfolio changes.
- Stay apprised of developments in the investment field to suggest strategy changes as well as to determine the best mechanisms for investment.
- Provide primary investment oversight, due diligence and reporting on legacy funds.
- Staff the Investment Committee to gain their insights and expertise, keep them informed, and provide strategic input and analysis. Present periodic investment performance reports to the board of directors.
- Manage adherence to the investment policy and report on compliance periodically to the Investment Committee.
- Provide strategic recommendations to the president based on financial analysis and projections.

Financial Management

- Analyze short- and long-term financial objectives, including cost efficiencies and operating effectiveness of processes and systems, staying up to date on best practices and new technologies to maximize efficiency.

- Provide high level oversight to staff to maintain effective internal controls are for compliance with GAAP and applicable legislation and regulation and oversee the finance department's day-to-day activities.
- Lead the foundation's annual budgeting process as well as overseeing long-term budgetary planning.
- Oversee audit and tax preparations processes and work with the Audit Committee.
- Report to the president, leadership team and to the board of directors regularly on the operating performance of the organization, including analysis of spending, variances and trends. Provide financial analyses to major organizational decisions.
- Periodically provide financial guidance to other Haas Jr. program initiatives as needed.

2. Core Operations. The VP provides leadership and guidance to core foundation operations and improves processes and policies in support of foundation goals.

- Supervise all legal, human resources, IT and facilities management functions for the organization with an eye toward systems improvement.
- Serve as the primary liaison for any legal issues for the foundation. Manage relationships with outside legal counsel. Review contractual agreements to ensure alignment with the mission and best interests of the organization.
- Assume overall responsibility for the organization's observance of laws and regulations, including those applying to employers, nonprofit organizations and private foundations.
- Maintain and improve compliance systems for grants made by the foundation and ensure grants are made in accordance with applicable rules re: lobbying and advocacy, expenditure responsibility, fiscal sponsor grants, etc.
- Responsible for organizational risk management, including insurance coverage, risk mitigation. This includes emergency and disaster-preparedness for Haas Jr. staff as well as cybersecurity.
- With the outsourced HR firm, ensure compliance with current laws and regulations as well as maintaining up to date HR procedures and compliant employee policies. Lead performance evaluation, compensation, promotion and professional development processes.
- Chair the staff Pension Committee which reviews pension policy and performance.
- Develop and implement a plan to meet current and future information technology (IT) needs based on user input and organizational priorities. Provide strategic direction on all facets of IT systems, including appropriate policy and procedures regarding use.
- Provide leadership, guidance and strategic direction with regards to the management of the foundation's facility including managing property lease agreements and tenant improvements.
- Document and archive records of all board and committee decisions on behalf of the organization.

3. Organizational Development and Culture. As a member of the executive leadership team, the VP plays an instrumental role in setting the tone for the organization and developing its culture.

- Develop and implement policies, procedures and activities that improve the overall culture, operations and effectiveness of the organization in support of meeting Haas Jr.'s strategic goals.

- Advance a deep commitment to diversity, equity and inclusion that is tangibly reflected in the organization's culture, systems and policies.
- Develop, plan and implement tailored ways to cultivate and maintain an equitable culture of trust and respect, learning, innovation, and continual improvement.
- Create, refine and ensure programs are in place to support and train supervisors to mentor and support staff growth, learning and development.
- Offer ideas and guidance to the leadership team about ways to improve foundation-wide team building, a culture of learning, communications, and organizational performance.
- In collaboration with Vice President of Programs, support periodic nonprofit financial analysis learning opportunities for staff.
- Other duties such as advising on special projects, as assigned.

Competencies

Success in the Vice President of Finance and Operations will depend on a range of knowledge, skills and abilities. As a candidate for the position, you will need to demonstrate:

- A demonstrated commitment to Haas, Jr.'s mission and values and the work of advancing equality and justice.
- Ability to professionally represent the Haas, Jr. Fund and the Haas family.
- Excellent judgement, ability to be an effective tactical as well as a strategic thinker.
- Analytic and a flexible and eager problem-solver that leans into complexity, focuses on solutions, and enjoys finding creative, simple paths forward.
- An excellent manager of people, with a solid track record of mentoring, developing and appreciating staff.
- A reputation of being easy to work with, highly collaborative and an effective team builder. Maturity and leadership with the ability to serve as a unifying force and an engine for culture change.
- Results oriented, exceptional at organizing, managing multiple projects simultaneously, meeting deadlines, and delegating appropriately.
- Ability to see the big picture and short- and long-term implications and ability to also to drill down into details and minutia if necessary.
- Excellent verbal and written communication skills.
- Embraces technology, knowledgeable about all facets of IT, and appreciates IT's contribution to organizational effectiveness, efficiency and culture.
- Awareness of and a deep commitment for racial justice, inclusion and equity.
- Compassion, empathy, a sense of humor, flexibility and a dedication to high-quality work.

Experience and Qualifications

- Minimum 15 years+ experience in a senior management role.
- A Masters in Business Administration is preferred.
- Experience managing finance, human resources, technology, legal and other functions at a foundation or nonprofit organization.
- Knowledge and experience analyzing investments.
- Must be familiar with nonprofit finance and regulations.

- A track record of success in people management and facilitating positive organizational and culture change.
- Previous experience demonstrating values consistent with the mission and work of the Haas, Jr. Fund.

The Haas, Jr. Fund offers competitive salaries and benefits. The salary for the Vice President of Finance and Operations will be \$200k+ depending upon experience. This executive search will be managed by Nonprofit HR. To apply, email a cover letter, resume, and list of three references (candidates will be notified in advance of any outreach to references) to vpfinance@haasjr.org. Use the subject line: VP of Finance and Operations. Please submit PDF files only (one combined PDF file is preferred). Applications will be accepted until filled.