

Managing Director, Finance & Investments

REPORTS TO: Chief Financial Operating Officer

DATE: May 16, 2019

APPLICATIONS DUE: Open Until Filled

VISIT US ONLINE: www.seattlefoundation.org

Who Are We?

The heart and science of philanthropy

Greater Seattle is changing and growing, and so is Seattle Foundation. "The heart and science of philanthropy" is the intersection of passion and discipline to create lasting change. As the community's foundation, our mission is to ignite powerful and rewarding philanthropy to make Greater Seattle a stronger, more vibrant community for all. We work with more than 1,200 individuals, families, and corporations to strategically invest their philanthropic resources in ways that inspire continued giving. We also partner with philanthropic institutions, government agencies, community organizations and businesses to catalyze positive change in our community across a range of issues.

Our organizational culture is one of engaged teamwork, where we support one another in reaching our collective and individual goals while constantly learning along the way. Our office is located in the downtown core of Seattle, however our reach is much broader than that – we focus on Greater Seattle and the Eastside and also support donor interests across the country and around the globe. We seek individuals to join our 40+ (and growing!) team who are committed to our vision of a stronger, more vibrant community for all; collaboratively finding solutions; continually improving; and going the extra mile in service of our philanthropic partners and the broader community. We're in the midst of an exciting evolution in our work. More information about Seattle Foundation can be found at www.seattlefoundation.org.

What's the Opportunity?

The Managing Director, Finance & Investments (MDFI) is primarily responsible for the investments, treasury, financial planning & analysis and gifts & grants administration of Seattle Foundation (SeaFdn), bringing strategic direction and tactical implementation to SeaFdn's investment accounting, financial operations, budgeting, business decision support and impact investments. This influential role requires deep knowledge of economic modelling, budget processes and investment principles. The MDFI will also function as a leader, in conjunction with the Chief Financial Operating Officer (CFOO), and will assume an active role in SeaFdn's future growth.

Treasury, Investments, & Finance

- Maintain regular contact with SeaFdn's investment consultant to establish regular flow of information with Finance staff and the Investment Committee.
- Supervise the investment activity of funds including reconciliation of investment pools, and earnings and expense allocation to individual funds.
- Responsible for the integrity and issuance of quarterly donor statements, including quality review and collaboration with the Philanthropic Services group to address and resolve donor questions.
- Work with outside legal counsel on investment due diligence and maintain updated documentation.
- Manage impact investments, including driving strategic alignment with our mission, and participation on cross department teams and in due diligence process, tracking investments and reviewing performance.
- Review, monitor, and report on all donor-recommended outside investment partners.

Finance, Collaboration, & Staff Management

- Responsible for the annual budget process, developing reporting, communicating variance analysis, and communicating with leadership and the board,
- Oversee the administration of gifts and grants.
- Actively participate as a member of the organization's Managing Director cohort to promote cooperation, communication and collaboration in accomplishing SeaFdn's annual and strategic goals.
- Provide financial modelling and business decision support.
- In partnership with the Managing Director, Controller & Accounting, participate on teams improving cross-functional processes and internal controls.
- In partnership with the Chief of Staff support our strategic plan development through financial modelling and other support including, developing appropriate financial metrics, tracking and reporting.
- Supervise and provide guidance and instruction to staff in their performance of assigned tasks.
- Ensure appropriate cross-training of department staff.

Board Committee Liaison – Finance & Investment

- Working with the CFOO and in partnership with the Managing Director, Controller & Accounting, and Staff Accountant, Investments, provide support for, Finance, and Investments Committee, Board of Trustees and others as directed. Duties may include agendas, minutes, policy research, memos, documentation, and recommendations.
- Determine how best to accomplish the tasks required to meet the objectives and decisions made by the Board Committees.

What Are We Looking For?

Preference will be given to candidates with knowledge and demonstrated experience in:

- Working with the CFOO and in partnership with the Managing Director, Controller & Accounting, and Staff Accountant, Investments, provide support for, Finance, and Investments Committee, Board of Trustees and others as directed. Duties may include agendas, minutes, policy research, memos, documentation, and recommendations.
- Determine how best to accomplish the tasks required to meet the objectives and decisions made by the Board Committees.

We are also looking for:

- Commitment to the vision, mission and values of Seattle Foundation.
- Familiarity with the non-profit sector and a strong commitment to the health and vibrancy of the greater Seattle area, specifically our commitment to racial equity and economic opportunity.
- Goal-oriented with ability to work independently and approach challenges with a high degree of adaptability.
- Excellent public speaking and writing skills. Must be comfortable making presentations to all levels in the organization, including the Board of Trustees.
- Effective collaborator with the demonstrated ability to engage and influence a wide range of stakeholders.
- Strong critical thinking and analytical problem solving skills, and a willingness to embrace new ideas and lead appropriate change.
- Extensive knowledge of budgetary preparation and management.
- Able to analyze and understand investment information provided by the Foundation's investment consultant and managers.
- Knowledge of principles of modern portfolio theory, and related processes and procedures.
- Able to translate complicated investment strategies to others, both internal and external to the Foundation.
- Excellent interpersonal skills, and ability to engage in professional growth and development.
- High degree of professional integrity with ability to work with confidential information.
- Professional maturity; ability to interact well with a diverse range of people.
- Experience in Blackbaud Financial Edge /Raiser's Edge/Grantor's Edge preferred.
- Affinity for philanthropy and the nonprofit community, with the capacity and attitude to serve.
- Willingness to work flexible schedule, when needed.

What Can You Expect?

A collegial work environment; a competitive salary and excellent benefits, including health insurances (medical, dental, vision and long-term disability); a generous retirement plan match; and vacation/sick leave.

What are the Physical Demands and Working Conditions?

The physical demands and characteristics of the work environment described here are representative of those occurring in the performance of the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the essential functions of this job, the employee is frequently required to stand; walk; sit; use hands to finger, handle, or feel objects, tools, or controls; and talk or hear. The employee is occasionally required to reach with hands and arms and stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and the ability to adjust focus.



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This position works in an office, and the noise level in the work environment is usually low to moderate. While performing the duties of this job, the employee is occasionally exposed to toxic or caustic chemicals, i.e. copier toner.

How Do I Apply?

As an equal opportunity employer, Seattle Foundation is committed to a diverse, multi-cultural work environment. Seattle Foundation does not discriminate in employment on the basis of age, race, creed, gender, religion, marital status, veteran's status, national origin, disability, or sexual orientation. People of color, people with disabilities, and people of diverse sexual orientations are encouraged to apply.

Please send cover letter and resume to: hr@seattlefoundation.org. The position is open until filled.