



## Senior Finance & Operations Manager Washington, D.C.

### EXECUTIVE SUMMARY

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*The National Center for Family Philanthropy (NCFP) is an Equal Opportunity Employer. It is the policy of NCFP to ensure equal employment opportunity without discrimination or harassment on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, disability, marital status, citizenship, genetic information, or any other characteristic protected by law. NCFP prohibits any such discrimination or harassment.*

**The National Center for Family Philanthropy (NCFP) is pleased to invite applications for Senior Manager, Finance and Operations (Manager).** NCFP works in collaboration with visionary philanthropic families to unlock their potential to create meaningful and enduring change.

Today, the field of family philanthropy is calling for support to respond to an increasingly intersectional world, requiring social-impact investments that are more strategic, justice-minded, and effective. Technological advances are allowing us to engage in ways we could not have envisioned 20 years ago. Covid-19 has further pushed the sector to reimagine systems of funding and support for addressing growing health and economic crises. Motivations for engaging in philanthropy, the structures that support giving, and the very definitions of philanthropy and family, are changing and being challenged.

The Senior Finance and Operations Manager is invited to contribute to the evolution and execution of NCFP's next-stage vision at a time of opportunity and growth. The Manager will work closely with NCFP leadership and staff to implement the effective financial and operational systems necessary to support a dynamic, emergent organization. She/he/they will help create a culture of trust and accountability, transparent communication, and continuous improvement. The Manager will serve as a bridge among the various functions of the organization, helping to integrate financial management, program, communications, and revenue generation workstreams and goals.

NCFP seeks an established professional with progressive experience managing daily operations of a nonprofit, foundation, or business, including directly interfacing with and supporting executive leadership / Boards of Directors. The successful candidate will be both a strategic thinker and an executor with a can-do approach. She/he/they will be a flexible team player able to work in a cross-functional team environment. She/he/they will be committed to motivating and supporting internal and external stakeholders to work together to create a culture and practice that centers the many intersectional aspects of equity and racial equity.

The salary for this position is \$80,000 – \$95,000 plus benefits, which include paid vacation; 10 holidays; new parent leave; 100% employee premium paid for medical/dental/vision insurance; retirement contribution; short and long-term disability and life insurance; transportation benefit; and professional development. This is a Fair Labor Standards Act (FLSA) status exempt position based in Washington, D.C. Staff are working remotely through January 2022. *Please see referral and application instructions at the end of this document.*

### ORGANIZATIONAL OVERVIEW AND CONTEXT

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When NCFP was founded, philanthropy as a professional field was nascent and NCFP developed programs to successfully meet the needs of the family philanthropists it served at that time. Organizations serving

philanthropists were not common. NCFP was instrumental in organizing and building a base of knowledge to support the development of a now recognized field of family philanthropy.

Today, the field of philanthropy is crowded with consultants, financial advisors, membership organizations, and academic centers. The pace of change in external context has rapidly accelerated as the field reckons with national disruption, the effects of climate change, health crises and long-standing structural inequities. Family philanthropy is confronted with a world where justice-minded and effective social impact investment requires proximity to communities that philanthropists aim to serve and learn from. Younger generations are more frequently contemplating the intersections of critical societal problems, like the effect climate change has on communities of color and their range of economic mobility.

NCFP is called to respond to its community of family philanthropists with support that is agile, evolving, and increasingly co-created by stakeholders and partners in the field. To achieve this, NCFP is adopting a new strategic plan, with a theory of impact linked to a clear business model, that calls for both an expansion in the number of families served as well as a deepening of their engagement toward more effective practices.

NCFP, guided by its refreshed theory of impact, works to:

- Elevate a vision for family philanthropy, including the potential and practices of impactful and intentional giving.
- Equip families and their partners to achieve purposeful outcomes with curated and relevant tools, resources, and skills.
- Activate and connect a diverse and engaged peer community of philanthropic families and partners.

To deliver on this vision, NCFP needs to bolster its operational and financial management capacities—to elevate, equip, and activate itself. Over the next three years NCFP will be building an organization ready to scale its impact, by investing in systems and staffing needed for growth, testing the program model, and establishing strong performance management and outcomes measurement. NCFP will make foundational investments in staffing, culture, capacity, and systems. This position will play a primary role in building the financial and operational foundation to deliver on this vision.

This position supervises an office administrator who provides support for some of the following responsibilities.

## **ESSENTIAL FUNCTIONS AND RESPONSIBILITIES**

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The Manager will be accountable for the following, some of which will be supported by an office administrator.

### **Financial Management**

- Responsible for timely and accurate execution of end-to-end accounting functions, including but not limited to payables, receivables, credit card and bank reconciliations, employee expense reporting, month end close, financial statements, cash flow forecasting.
- Oversee budgeting and budget implementation to monitor progress and inform resource allocation.
- Act as staff liaison and support to the Board of Director's Finance and Audit Committee.
- Create and recommend policies on banking, cash management, internal controls and other relevant fiscal matters.
- Work with Board-selected CPA firm to coordinate annual financial audit and 990 filing.
- Ensure NCFP compliance with tax laws and filings, state licensing and registration requirements.
- Work with the fund development team to routinely reconcile the accounting system with the donor management system, accurately and efficiently administer receivables, and manage grant award budgets.

### **Human Resources**

- Ensure NCFP compliance with state and federal laws related to human resources.
- Coordinate personnel hiring, onboarding and exit processes.
- Administer payroll (via third-party vendor); manage timesheets and PTO accruals.
- Maintain personnel files for all staff.
- Assist with the annual performance review process.
- Coordinate onboarding of new hires including set-up and training on applicable IT tools, resources, policies, and procedures.
- Manage employee benefits, with external vendor support, including insurance, retirement, and FSA.
- Support leadership in periodic review of compensation philosophy and market analysis of salaries.

### **Information Technology**

- Serve as liaison between staff and external IT vendor.
- Coordinate resolution to IT-related issues for the office and staff.
- Work with vendors and maintain contracts for IT systems including computer hardware and operating software, MSFT Office 360, shared file system, email, telecommunications, video conferencing.
- Research, recommend and coordinate process to move NCFP from a physical server to the cloud.
- Provide or resource support for training on and support of marketing and relationship management systems (website, event registration, payment, CRM, email communications, etc.).

### **General**

- Serve as bridge and translator among the various functions of the organization; help integrate financial management, program, communications, and revenue generation workstreams and goals.
- Take a lead on creating collegial and positive organizational culture that reflects NCFP values.
- Establish contract management policies and procedures.
- Oversee general office operations, space planning, supplies and vendor management, equipment and appliance maintenance, ordering supplies.

## **QUALIFICATIONS OF THE IDEAL CANDIDATE**

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The ideal candidate will be inspired by NCFP's mission and intent to grow and reach more philanthropic families, resulting in both increased and more sustainable social impact. She/he/they will be committed to creating a culture and practice that centers the many intersectional aspects of equity and racial equity.

While no one person will embody all the qualities below, the ideal candidate will possess many of the following professional and personal abilities, attributes, and experiences:

### **Foundational Requirements**

- Committed to NCFP's theory of impact for family philanthropy
- Committed to a workplace that values different backgrounds and life experiences. Desire to learn about and incorporate equity and racial equity lenses into structures, systems, and processes for NCFP employees and the constituencies NCFP serves
- Ability to multitask and meet deadlines as well as demonstrated resourcefulness in setting priorities; strong organizational skills and exceptional attention to detail
- An orientation towards using data (of various types) for learning and continuous improvement; ability to take initiative and contribute ideas for enhancing performance
- Desire and ability to coach and educate team members on financial reporting, metrics, and processes
- An optimistic outlook and the humor, integrity, kindness, and patience necessary to work in a transformative, dynamic environment

### **Desired Leadership Competencies**

- *Translates Strategy to Operational Goals:* Translates organizational mission and programmatic strategy into practical goals for NCFP financial management and operations. Supports most effective and efficient use of organizational tools and resources. Empowers team ownership of budgets and resource allocation. Monitors progress and provides transparent feedback to all levels of the organization.
- *Drives Change (Takes Action):* Supports NCFP's next stage of organizational development by bringing experience, wisdom, and insight to the work of financial management and operations. Leverage's data-based observation and interpretation to engage stakeholders in shaping and implementing solutions.
- *Manages for Results & Delegates Effectively:* Helps team members set finance and operations-related goals that can achieve measurable results and helps promote accountability at the team and individual level. Holds self and others to high standards. Facilitates ownership and decision-making by establishing clear parameters. Provides and asks for supportive coaching and direct feedback.

### **Desired Technical Competencies, Experience, Certifications, & Education**

- 5+ years of relevant work experience in nonprofit financial management and accounting; progressive experience with strategic and hands on management of daily operations of a nonprofit, foundation, or business; at least 2 years of direct interface and support of management/Board of Directors
- Knowledgeable in current and emerging policies, practices, trends, technologies, and information affecting the finance and operations functions of a nonprofit organization
- Demonstrated ability to synthesize and communicate complex financial information and ideas, and to use financial analysis to evaluate and act on strategic options and opportunities
- Ability to integrate fund development, program planning and financial management; ability to build collaborative and productive relationships with other departments
- Desire for a strong sense of community and integration with other team members (this is not a silo)
- Ability to work in a flexible, fluid, cross-functional team environment
- Facilitation and engagement skills (including virtual), and experience managing up, down and across toward successful implementation of financial management and operational priorities
- High EQ, including strong written and verbal communication skills and experience with organizations in transition; relationship-oriented
- Ability to manage and troubleshoot IT functions with outsourced support
- Experience managing human resources functions internally and with external vendors
- Demonstrated resourcefulness in listening, assessing, setting priorities, managing time and taking initiative to find resources and propose solutions
- Personal qualities of integrity, credibility, and a commitment to NCFP's vision, mission, and values
- Proficient with QuickBooks online, or similar accounting software
- Superior proficiency with MS Office Suite, particularly Outlook, Excel, Word, PowerPoint, and ability to quickly learn new software
- Familiarity with Salesforce, HubSpot, WordPress or comparable systems desired
- Demonstrated ability to meet deadlines and maintain composure under pressure
- Flexibility to attend occasional evening meetings
- BA/BS, particularly in accounting or finance; strong work experience in relevant field considered

For more about the **National Center for Family Philanthropy**, please visit: <https://www.ncfp.org>

To apply, send a cover letter and resume to Aaron Jacobs at [hr@ncfp.org](mailto:hr@ncfp.org), subject line: Finance and Ops Search. NCFP will begin reviewing applications on a rolling basis on June 1, 2021.

Thank you for your interest!