



THE 360 GROUP
— EXPECT THE UNEXPECTED —

Charles and Helen Schwab Foundation

Executive Director

Position Description & Candidate Profile

Executive Director

Location

San Francisco, CA

Reports to

Board of Directors

Our Client

The Charles and Helen Schwab Foundation was established in 1987. It is a private, family foundation separate from all activities of The Charles Schwab Corporation and the Charles Schwab Corporate Foundation, reflecting the values and aspirations of the Schwab family.

At its core, the Foundation believes that every person has the potential and deserves the opportunity to lead a happy and productive life, and the Foundation's work reflects this conviction. Quality education holds the key to maximizing people's potential and the opportunities that lie ahead. The Foundation's chief concern is that many young people throughout the nation are deprived of the high-quality education they deserve. The status quo has not served them well, so education reform is very important to the Foundation. Providing a high-quality education for all students will generate benefits for our society on many levels and for many years to come: it will help each young person thrive in his or her personal and professional life; it will strengthen communities and help revitalize our democracy; and, it will create a more skilled workforce and robust national economy. For all of these reasons, the Foundation seeks organizations that are dedicated to improving the public education system, closing achievement gaps among students of different racial and socioeconomic backgrounds, and ensuring that all students in California and across the country have the opportunity to reach their full potential. The Foundation supports charter schools, talent development, and parent empowerment, to name a few examples.

At the same time, the Foundation also recognizes that human suffering takes many different forms and affects people from all walks of life. For this reason, the Foundation supports a wide range of human services organizations that work to end poverty and alleviate suffering, taking aim at its root causes, and giving people a fair shot at their own success. To date, much of the human services grantmaking has been responsive to the external environment and Trustee interests; it is poised to evolve even further.

These issues remain important, and now at this critical moment of racial reckoning, the Foundation is committed to deepening its equity work in developing and unleashing human potential.

For more than thirty years, the Foundation has had the privilege of collaborating with organizations and individuals who are leaders in their fields – extending the Foundation’s own philosophy, approach and work. At the same time, collecting and interpreting data to measure impact is a critical part of the Foundation’s work. The Foundation has enormous respect for the leadership, passion and ingenuity shown by so many working to transform the lives of others, and will continue to support organizations which share these qualities and which work tirelessly to make the world a better place.

We invite you to learn more about the Charles and Helen Schwab Foundation at <http://www.schwabfoundation.org>!

Position Responsibilities

The Charles and Helen Schwab Foundation seeks a new Executive Director to provide thoughtful strategic and operational leadership, promoting the fulfillment of the Foundation’s mission, while helping the Board of Directors realize their collective vision of maximizing human potential. The preferred candidate will have a compelling mix of experiences, skills, personal characteristics and motivations to work with the family in leading, managing, and advancing the Foundation’s initiatives, grantmaking, evaluation and external engagement in order to achieve the Foundation’s mission in the short term and over the long term.

The new Executive Director will play a variety of roles. The Executive Director will recruit, develop, and lead a largely new and significantly larger staff; manage the finances strategically and effectively; work with the Board and the family office team; and, lead grantmaking, convening and other activities of the Foundation as it continues to evolve. Initially, it will be important that the new Executive Director develops a collaborative and productive relationship with the family and Board and add to and lead a relatively small staff. Early on, the new Executive Director will assist the family in refining the Foundation’s mission, vision and strategy. The new Executive Director will help the family integrate the voices of grantees and other community partners into the Foundation’s work. The successful candidate will likely have experience in philanthropy, and more specifically, family philanthropy, because that experience would serve as a framework for identifying and focusing on ideas and models that have proven their impact.

Specifically, the Executive Director's responsibilities will include:

Leadership

- Providing leadership, information, and support that enhance the governance of the Foundation
- Hiring, leading and mentoring staff to ensure that the Foundation's programs advance the organization's mission and vision and achieve the desired impact set out in its strategic priorities
- Establishing and maintaining positive relationships with the family, an active Board of Directors, grantee partners, and other funders, to effectively leverage and promote the Foundation's reach and impact
- Cultivating new relationships and strengthening existing ones with the Foundation's key stakeholders, including other private funders, public sector leaders, nonprofit and foundation leaders, private sector partners and other opinion leaders; this function will be particularly important to position the Foundation in participating and leading funding collaboratives
- Leading external communications on behalf of the Foundation in philanthropy through representing the Foundation in private and public venues
- Driving thought leadership perspectives and dissemination strategies to present clearly the work of the Foundation and its grantees to funders, other partners in the work and the community at large in contemporary ways
- Advising, counseling and directing staff activities; ensuring staff team operates at a high professional level
- Assiduously and intentionally ensuring that the Foundation's staff is a diverse one, representing a range of backgrounds, life experiences, skills and viewpoints; in short, a work environment that values integrity, transparency, equity and inclusion

Strategic Development and Management

- Designing and leading processes for the family and Board, on an ongoing basis, to refine its mission, vision and strategy
- Ensuring that the Foundation creates a flexible framework for giving and other programmatic activities that can nimbly respond to changes in the external environment
- Further centering racial equity in the Foundation's strategy and grantmaking
- Balancing creative and visionary thinking with operationally measurable and quantifiable implementation of the Foundation's strategy, identifying

approaches to extend the Foundation's impact, such as systems and policy change

- Orienting the Foundation to be a learning organization: measuring its impact, listening to grantees and others who are closest to the issues and communities the Foundation seeks to address, and striving for continuous improvement in strategy and operations

Grantmaking

- Identifying needs in the Foundation's fields of interest, and developing appropriate foundation grantmaking priorities; working with the Board and staff to develop and implement the Foundation's grantmaking and the family's philanthropy
- Creating a vision and direction for how the Foundation practices philanthropy; i.e. level of engagement with grantees and the broader field
- Engaging deeply with all of the program areas, as the organization is not designed to have program officer/director infrastructure
- Lead the administration of the Foundation's grant cycles, directing the work of the staff with grantee partners to connect with the Board's priorities
- Sharing best practices with the field, and staying abreast of issues facing the Foundation's fields of interest

Board Management

- Engage Board members in the actual work of the Foundation and, more specifically, its grantees
- Lead the planning and preparation process for Board meetings
- Facilitate key Board discussions, and ensuring follow-up on decisions and action items

Operational and Financial Management

- Ensuring the effective action of the Board in governing and overseeing Board affairs
- Working with the family office, ensuring that the Foundation sustains the highest level of effectiveness and efficiency through its people as well as through internal controls, budgeting and finance; in addition, ensuring that the annual audit is accurately prepared on an appropriate schedule and there are no significant management findings
- Supporting the mission of the Foundation through the investments and financial activities of the Foundation, in conjunction with the Board, the family office and consulting support, as needed

- Ensure effective grants management, record-keeping and legal compliance – staffing appropriately to fulfill these functions

Profile of the Successful Candidate

The Charles and Helen Schwab Foundation seeks an entrepreneurial, effective leader who is steeped in programs, systemic change, organizational management and development, communication and consensus-building. The new Executive Director could come from a variety of leadership backgrounds; the successful candidate will have a demonstrable commitment to human potential – as expressed through education, human services or other relevant areas – with experience in family foundations, or, more broadly, the public, private or philanthropic sectors.

Critically, the Foundation seeks a leader who has a track record of effective and judicious deployment of financial resources, and one that demonstrates strong integrity and a commitment to professional excellence, combined with values that wear well over the long term. As this position works with a family, the successful candidate will need to be flexible, approachable and responsive.

More specifically, the Foundation seeks a seasoned professional who has:

- Leadership experience in the family foundation arena – or the nonprofit, public or private sectors – in organizations of similar size
- Demonstrated success in working with boards and other private and public funders
- Deep concern for underserved communities and a disposition to help build their leadership capacity and resilience
- Knowledge of the nonprofit infrastructure environment
- Understanding of the role and nuances of philanthropy in closely supporting grantee partners
- Successful experience in grantmaking program development and board relations, especially in a family environment
- Demonstrated ability to develop an efficient and effective organizational infrastructure
- A communicative and collaborative approach, evidenced through strong written and oral skills as well as strong listening skills
- An inclusive, consensus-building leadership style both in and out of the public spotlight that inspires others
- Solid experience in quantifying and measuring the performance of organizations

Start Timeframe

We seek to have someone in place by late Fall 2021.

Compensation

This position offers a competitive salary and includes a comprehensive benefits package. *We actively welcome all candidates from a wide range of backgrounds who have the skills to fulfill this role – regardless of compensation history.*

To Apply

All applications are held in strict confidence. Please submit your credentials and a letter of interest through our private applicant portal to The 360 Group at:

<https://the360group.us/portal>

Applications should be directed to the attention of Vincent Robinson, Managing Partner, or Monica Rodgers, Senior Consultant. Applications will be reviewed on a rolling basis. Earlier applicants may receive priority consideration. To be considered, The 360 Group encourages all interested candidates to submit their applications promptly, via the confidential applicant portal linked above.

At The 360 Group, we know that a richly diverse mix of professionals makes organizations more effective. Using that principle as our “North Star,” we make diversity a hallmark of our firm, and all of our search engagements.

Learn more about The 360 Group at the360group.us.