

Executive Director, Private Family Foundation

**Position Description
2024**

THE OPPORTUNITY

A private family foundation ("The Foundation") is moving into its next phase of growth and impact and seeks to hire its first Executive Director (E.D.). This is an exciting opportunity for an experienced, collaborative, and values-driven leader -- with a deep understanding of the potential and uniqueness of family philanthropy -- to proactively carry out the Founder/Board President's ("The Founder") vision.

The E.D. will lead and manage across the Foundation's philanthropic grants and operating programs. Since 2015, the Foundation's passionate founder has instilled strong values of creativity, amplifying the voices of others, and encouraging those helped to pay it forward. Four words describe the Founder's thinking about philanthropy, the way they want to work, and the kinds of organizations that they like to support: heartfelt, vibrant, practical, and organic.

An engaged Board of Directors makes funding and policy decisions and will continue to be actively engaged in the Foundation's work, while a capable, reliable and enterprising E.D. who, in this new role, will oversee the day-to-day operations. The E.D will partner closely with the Founder and a small core team of consultants to achieve this hand-off and will: manage the team, reinforcing a cohesive and productive culture; build the operational infrastructure needed for success; and advance the Foundation's programmatic goals and partnerships.

Reports to: Founder/Board President and the Board of Directors

Based: Back Bay (Boston, Massachusetts). Working in close partnership with the Founder and team, this is an in-person position; there will be occasional travel.

Key Responsibilities:

Management

- Manage, mentor, onboard, and evaluate staff, supporting their growth and development.
- Promote an in-person office culture that is highly professional and organized with an emphasis on teamwork, accountability, and mutual support.
- Model and foster clear communications and trust -- between the Board, grantees, staff, advisors, and partners -- as well as professionalism and service-orientation.
- Track all the Foundation's activities and enterprises, transparently communicating progress, challenges, impact and outcomes.
- Ensure that written documents and communications meet the highest standards.

Program Planning, Implementation and Grantmaking

- Work with the Board and staff to implement the Foundation's current strategic direction, creating workplans, goals, and timelines.
- Oversee program staff in education/scholarship and arts/culture to ensure that mission/goals are attained.
- Represent the Foundation to external partners, highlighting the work and outcomes while maintaining appropriate discretion.
- Ensure that the existing grant process is aligned with the Foundation's priorities; assess and make recommendations for changes as needs evolve.

Board Engagement and Strategy

- Develop strong working relationships with trustees, individually and in their collective work.
- As a thought partner and advisor to the Founder, support evolutions of the strategy; ensure that future adjustments are implemented effectively.

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- Oversee the preparation of the agenda and board book for quarterly meetings; ensure that trustees have meaningful information – grantmaking reports, program progress summaries, etc. -- and materials needed to make sound decisions.

Finance, Operations and Compliance

- Track and monitor budget to actuals to ensure compliance with the required minimum distribution.
- Analyze and oversee investments in technology (file sharing, database/relationship management, grants management, etc.) and other systems; ensure aligned processes and that staff/trustees have the training and support to leverage them.
- Ensure that staff, external counsel and advisors are completing the foundation's audit, taxes and annual filings, and also that compliance systems are in place.

Qualifications, Skills, Knowledge and Leadership Characteristics:

The ideal Executive Director candidate will bring senior leadership experience, ideally gained within a combination of advisory (requiring high quality service delivery) and operating (family office/foundation, mission-driven business, social enterprise or nonprofit) environments.

Notable accomplishments across as many as possible of the following:

- Translating a founder's or principal's vision into tangible priorities and action plans.
- Mentoring and managing a high-performing team.
- Collaborating with internal and external stakeholders to advance goals across multiple program areas.
- Ensuring, clearly communicating and reporting on progress, outcomes and results.
- Developing effective, streamlined processes and infrastructure in a lean, entrepreneurial environment.
- In partnership with a board of directors, fleshing out strategic options as well as anticipating/supporting decision-making.

Leadership and Personal Characteristics:

- Clear and proactive communicator, both orally and through written summaries and documents.
- Able to connect authentically; a culture builder with strong emotional intelligence and relationship orientation.
- Demonstrated interest or expertise in the Foundation's core focus areas, including the whole student, college access/attainment, youth development or mentoring.
- Brings creativity and a bias for action; able to work both independently and collaboratively with internal and external stakeholders.
- Skilled at (and enjoys) spanning high-level strategy and hands-on implementation.
- Is a confident, organized and analytical problem-solver.
- Tech savvy (ideally with knowledge of Constant Contact, GivingData and other platforms).
- Low ego with maturity, judgment, discipline, integrity, discretion and a commitment to privacy.

Compensation: The starting range for the E.D. position is \$200,000-\$225,000 plus benefits.

Process: Please share nominations or confidentially submit a resume and cover letter to Viewcrest Advisors at: privatefamilyfoundation@viewcrestadvisors.com

Timeline: Applications will be reviewed on a rolling basis until April 10, 2024.

The Foundation is proud to be an Equal Opportunity Employer. Candidates of all backgrounds are encouraged to apply. We are committed to the principle of equal employment opportunity and to providing employees with a work environment free of discrimination and harassment. All employment decisions are based on merit, needs, individual

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qualifications, and job requirements, without regard to race, color, religion or belief, national, social or ethnic origin, sex, age, physical, mental or sensory disability, sexual orientation, gender identity and/or expression, marital, civil union or domestic partnership status, past or present military service, or genetic information, family or parental status, or any other status protected by law.

Viewcrest Advisors is committed to social justice and access to opportunity and actively cultivates relationships with leaders who have varied life experiences as well as the skills needed to lead strong, innovative organizations. The team is committed to your privacy and to protecting your personal data; to view the firm's privacy policy, please visit: www.viewcrestadvisors.com.