



THE 360 GROUP
— EXPECT THE UNEXPECTED —

The Collins Foundation

Chief Financial Officer

Position Description & Candidate Profile

Chief Financial Officer

Location

Portland, OR

Reports to

Chief Executive Officer

The Opportunity

Founded in 1947 by Truman W. Collins Sr. and other members of the family of E.S. Collins, The Collins Foundation supports Oregon nonprofit organizations, both rural and urban, that are dedicated to improving quality of life and well-being for the people in their communities. A committed Board of Trustees comprised primarily of family, along with community members and staff, works collaboratively to make grants that further the Foundation's mission and goals. In 2015, after many months of learning, reflection, and planning, the Foundation launched its three-year plan to advance equity, diversity, and inclusion within the organization and in its grantmaking. Over the course of three years, the Foundation is growing its staff and board to more fully reflect the communities it serves, piloting at least one new grant initiative that expands its longstanding practice of responsive grantmaking, and building a more diverse group of grantees across its multiple areas of interest.

As a funder and partner, The Collins Foundation is committed to the pursuit of equity, both in how it allocates resources across Oregon's diverse communities and how it shapes its internal structures. The Foundation's vision is for the state of Oregon to be a place where all people have access to high quality, culturally responsible services in sectors such as health, social services, education, housing, and employment. The Foundation also envisions vibrant neighborhoods and communities where residents enjoy access to healthy food, a rich variety of artistic and cultural expression and the benefits of Oregon's natural environment.

To be successful, the Foundation's internal structure will continue to evolve to meet the Foundation's goals. The staff and trustees will better reflect the communities it serves, and the Foundation's equity lens will continue to sharpen in its grantmaking and internal processes. As the CEO's responsibilities become increasingly strategic and outward-facing, the CFO position is growing to full time. Responsibilities will include not just finance, investments and accounting, but also broader operational activities that support the Foundation's infrastructure. Managing human resource needs and working to improve internal systems will expand the role's duties in order to support Collins' advancing workplace. The Collins Foundation's CFO opportunity provides fertile ground for an ethical, effective, experienced professional to assume broad responsibility at the most senior level of a beloved, highly-regarded Oregon foundation.

Learn more about The Collins Foundation at <http://www.collinsfoundation.org!>

Position Responsibilities

The Chief Financial Officer plays a key role in the overall management of the Foundation. The person selected for this position will be responsible for all financial planning and compliance, including accounting for a diverse investment portfolio, annual audit and oversight of tax return filing. The CFO guides investment activity, works with investment consultants, and may explore new areas for the Foundation, such as mission-related investing. The CFO will serve as the liaison to the Board of Directors on financial issues. This position reports to and works in cooperation with the Chief Executive Officer, particularly on operational activities, and is a member of the senior management team.

Specifically, the Chief Financial Officer will be responsible for:

Financial Management and Investment Administration

- Develop annual grants and operating budgets, manage financial process organization-wide, and provide ongoing fiscal and budgetary management
- Oversee the preparation, review, and reporting of financial statements, and accompanying analyses, for management and Board, and in accordance with accounting, audit and tax standards
- Advise and provide staff support to the Board of Directors to carry out investment decisions made by the Board; serve as chair of Investment Committee; maintain accurate records of decisions of the Board; prepare reports for bi-monthly Board meetings
- Develop, implement, and manage policies and procedures for efficient and accurate communications and recordkeeping for a diverse investment portfolio; provide effective and timely cash flow management, ensuring cash is available to meet grant and operating expenses; work closely with Assistant Treasurer to ensure controls, efficiencies and best practices are employed

Legal and Regulatory Compliance

- Keep current on regulations relevant to private foundations to ensure regulatory compliance and timely filing of reports
- Responsible for meeting tax requirements and compliance: 990 tax preparation, filings, estimated payments, and other third party/government reporting and filings; ensure compliance with 990 reporting of grants and accounting requirements; work with accounting firm to ensure complete and accurate preparation of tax return

- Responsible for financial and other third party audits

Risk Management and Internal Controls

- Oversee and provide guidance as to policy management, including adequate coverage, renewals, and financial considerations
- Maintain best practices according to accounting, audit and tax standards for non-profits
- Continually monitor and, when necessary, implement new internal controls to ensure appropriate segregation of duties and assignments among staff, as well as secure systems of processing payments and contractual agreements with appropriate signature authority

Internal Management/Operations

- Work with CEO as a resource for all financial and operational issues; manage key aspects of human resources including compensation and benefits, personnel policies and implementation, insurance and retirement plan selection and administration; participate in hiring and training, planning and directing work, and performance evaluation process
- Directly supervise and regularly communicate with the Assistant Treasurer
- Oversee and manage relationships with The Collins Companies IT function, as necessary, as well as with external investment consultants, auditors, insurance brokers and legal counsel

Organizational Building

- Contribute to the continued development of a supportive and collaborative work environment through active participation in internal collaborations, teams and activities
- Support and foster the Foundation's inclusive environment and commitment to advancing equity both within the organization and in its grantmaking
- Represent the Foundation at various conferences/meetings related to investment matters

Profile of the Successful Candidate

This position offers the right candidate the opportunity to put his or her well-honed

business skills to work on behalf of families across the state of Oregon. The ideal candidate will have a strong interest in the program work of The Collins Foundation and a desire to contribute to the organization's mission through the development and support of strong internal capacity and systems. This position requires someone who is able to balance a range of responsibilities and work proactively to address the organization's needs with an energetic, collaborative nature.

More specifically, the Foundation seeks a professional with the following attributes:

- Ten or more years of financial experience in a management role, preferably within a non-profit organization or a foundation
- An MBA or relevant graduate degree, or comparable experience; CPA preferred
- Strong financial planning and analytic skills
- Strong written and oral communication skills; the ability to communicate effectively with a diverse range of audiences
- An information seeker with a high level of curiosity and creativity in problem-solving
- Demonstrated ability to effectively manage and function as a member of a team in a fast-paced work environment that sometimes requires “all hands” for any given circumstance
- A deep-rooted personal interest in, and commitment to, working in a diverse and inclusive work environment that places a high value on equity; commitment to fostering a positive workplace culture of collaboration and respect

Additionally, the successful candidate will likely have:

- A passion for community philanthropy and social justice
- Experience with investment management and mission-related investing

Start Timeframe

We seek to have someone in place by Fall 2017.

Compensation

The salary range for this position is \$145,000-\$165,000. Compensation will be

commensurate with experience, along with an appropriate benefits package.

To Apply

All applications are held in strict confidence. Please submit your credentials and letter of interest via email to The 360 Group at:

TCF@the360group.us

Applications should be directed to the attention of Vincent Robinson, Managing Partner. No calls, please. To be considered, The 360 Group urges interested candidates to apply as soon as possible; applications submitted before 5:00pm Pacific time on **Friday, July 21, 2017** will receive priority consideration.

The Collins Foundation is an equal opportunity employer committed to creating a work environment that values the cultural and personal perspectives afforded by individual life experiences. The Foundation is a welcoming environment that values diversity, equity, and inclusion both within the organization and in its grantmaking. The Collins Foundation encourages applicants from diverse backgrounds and seeks to hire qualified staff reflecting the diversity of the communities it serves.

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.