



JOB ANNOUNCEMENT

Position Title: Vice President, Finance & Investment
Reports To: President/CEO
Pay Grade I: \$123,807 - \$151,664
Position Status: Full Time
Posting Dates: Friday, December 17, 2021 – Monday, January 21, 2022

About KZCF:

KZCF, established in 1925, has the vision of Kalamazoo County being the most equitable place to live, with the mission to mobilize people, resources, and expertise and to advance racial, social, and economic justice. Learn more at kalfound.org.

Core Values:

Center Anti-Racism and Equity
Advance Racial Justice
Nurture Healing and Love
Cultivate Transformative
Serve the Greater Good
Learn and Grow
Embrace Joy

Position Summary:

Responsible for managing and leading the financial aspects of the Community Foundation to ensure the organization's ability to provide programs that are equity minded and beneficial to the community. Provides overall leadership, direction and responsibility for the Community Foundation's invested assets and supports its mission driven deployment of assets with an equity minded lens. Performs as a key member of the Leadership Team.

Essential Duties & Responsibilities:

Position Functions:

- Finance Oversight
 - Manages and leads all financial services of the Community Foundation with an equity minded lens
 - Oversees policies and procedures in order to minimize errors and maximize our community's perceptions of the Community Foundation.
 - Oversees preparation of annual spendable calculations and unrestricted grant budget calculation.
 - Manages and oversees the annual financial statement and internal controls audits and implements recommended changes as directed by the Audit Committee.

- Coordinates and staffs the Audit Committee and oversees the execution of the Financial Accountability policy.
- Reviews and signs all grant checks and administrative checks.
- Manages and oversees preparation and ongoing evaluation of the annual and forecasted Integrated Budget.
- Investment
 - Leads, manages, and develops recommendation for changes to the Investment Policy.
 - Provides staff leadership to the Financial Investment Committee in supporting its core asset investment responsibilities.
 - Conducts due diligence of noncore investment managers and makes changes as necessary in consultation with VP, Donor Relations and CEO.
 - Provides guidance for interim liquidity and/or major asset liquidations or investments.
 - In partnership with the VP, Grants/Community Investment supports Impact Investing Committee in developing policy and procedures for impact investments
 - Conducts due diligence for impact investments in coordination with CI team and makes recommendations to Impact Investment Committee and Board
- Spending
 - Leads, manages, and develops the unrestricted and restricted Spending and Ceiling/floor policies for Board approval.
 - Develops Spending Policy Analysis and provides leadership and oversight for underlying expected return studies and supporting data.
 - Interprets, develops, and makes recommendations for spending policy changes as needed.
- Gift Acceptance and Expectancy Management
 - Serves as a member of the Gift Acceptance committee
 - Review paperwork for matured expectancies and provide expertise to donor relations
 - Analyze fair market value of expectancies for the annual audit
- Supervision of staff
 - Supervises finance and investment staff. In doing so, assigns, plans, and reviews work; establishes priorities; instructs and trains employees; supervises projects; conducts performance evaluations and corrective action or job counseling; and participates in hiring and terminations.
- Other
 - Participates in local, regional, and national projects that contribute to the advancement of the Community Foundation and the field in general.
 - Conducts other activities as assigned by the President/CEO.

Diversity, Inclusion, Equity, and Anti-Racism:

- Apply an equitable and anti-racist analysis to all functions to achieve organizational goals.
- Embrace, support, and integrate Community Foundation philosophies related to diversity, inclusiveness, and anti-racism with a willingness to acknowledge and address other forms of bias.

- Ability to confront personal, individual, and internal systemic bias with regards to race, age, gender, gender- identity, sexual orientation, ability, etc., which will require sharing and discussing personal identities in relation to the work environment.
- Ability to work and navigate emotionally taxing conversations related to power, privilege, racism, and oppression on a regular basis.
- Must have strong emotional intelligence and resiliency skills to lead and/or actively participate in advancing our work relative to racial, social, and economic justice.

Professionalism:

- Support the mission, vision, and strategic goals, as a part of the Performance Excellence Model of the Community Foundation, to serve both internal and external customers.
- Follow and support Community Foundation policies and procedures.
- Evaluate own performance and assumes responsibility for professional development.
- Embrace philosophy of one actively engaged in lifelong learning.
- Demonstrate and models Process documentation for clarity and consistency.
- Maintain current knowledge of all changes affecting area of work.
- Conduct self in a professional manner and follows and support the core values, commitments, and behaviors.
- Maintain appropriate professional appearance and confidentiality.

Engagement/Participation:

- Actively represents KZCF at community-based meetings and events which may require evening and weekend engagement throughout the year
- Actively participate in meetings, committees, and volunteer opportunities within the organization
- Apply an anti-racism analysis and engage with others in support of learning ways to advance collective DEI understanding and skills.
- Participate as a team member utilizing a collaborative style to achieve mutual goals.
- Provide proactive, creative cross-functional thinking and ideas to enhance services to customers.
- Demonstrate ability to work effectively with others.

Knowledge, Skills & Abilities:

Required:

- Bachelor's degree in business or a related field with specialized understanding of Accounting, Investments, and Finance or an equivalent combination of training and relevant work experience.
- In-depth knowledge/understanding of computers including general business software (i.e., Word & Excel) and
- Minimum six to eight years progressively more responsible experience in the following areas:
 - Accounting, investments, and general finance
 - Supervising and motivating several staff working on numerous projects
- Developing recommendations based on organizational mission and values.

- Demonstrated ability to effectively interact, communicate, and collaborate with people from all cultural backgrounds.
- Must have the ability, judgement, poise, and personal capabilities to build and maintain trust.
- Strong emotional intelligence and conflict resolution skills and strengths
- Ability to work & navigate emotionally taxing conversations/contexts related to power, privilege, racism, oppression with diverse stakeholder groups.
- High personal resiliency skills and tools
- Deep personal commitment to addressing racism with an orientation toward the Kalamazoo community.
- Experience representing organizational positions within community settings.
- Ability to work both independently, as a team member, and with a broad range of constituencies.
- Ability to prioritize multiple projects and work under pressure.
- Willingness to learn and be adaptive to support a complex and evolving body of work.

Preferred:

- Certification as a Public Accountant
- Thorough knowledge of income and estate issues of charitable planning
- Understanding of industry specific software (i.e., Financial Edge)
- Income and estate tax planning for charitable giving
- Ability to apply a racial equity analysis

Physical/Mental Requirements:

- Works in well-lit, pleasant, smoke-free office.
- Must be able to sit for long periods of time.
- Able to stoop, bend and move intermittently to do filing and move equipment and supplies necessary for job function.
- Involves frequent repetitive movement associated with extended periods of keyboarding.
- Frequently involves extended workdays.
- Occasional travel and/or overnight work schedules.
- Periodically involves irregular work hours.
- Requires attention to detail/concentration on figures, paperwork, data, etc.
- Frequent pressures related to meeting deadlines and fulfilling scheduling requirements.
- Frequent distracting influences such as people, phone calls, noise and so forth.
- Frequent simultaneous handling of multiple tasks and intermittent or cyclical work pressures.
- Frequent on-call availability to handle work problems, emergencies/crisis situations etc., at all hours.

The above is intended to describe the general content of and requirements for the performance of this job. It is not to be construed as an exhaustive statement of duties, responsibilities, or requirements. To successfully perform the job, individuals must be able to satisfactorily perform each essential duty. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

How to apply: Please send resume and cover letter to Darian@TheHRShop.com with the role you are applying for in the subject line.