

Finance and Operations Manager

About the Trust

The May & Stanley Smith Charitable Trust is a private foundation that stewards the charitable intentions of Mr. and Mrs. Smith beyond their lifetimes, and aims to focus, deepen, and enhance efforts to achieve significant, lasting, positive changes that promote well-being for individuals and communities. The Smiths practiced a quiet, modest generosity with interests ranging from education to horticulture. Mr. Smith passed away in 1968 and Mrs. Smith in 2006. The Trust was founded in 1989 and gives the Trustees broad powers to develop strategies and funding interests. Over the years, the Trustees have used the Smiths' own examples of individual achievement given the opportunity and effort, along with Mrs. Smith's own suggestions for grants when the Trust was established, as guidance in defining the scope of the Trust's activities.

Under the Trust's current strategic plan, grantmaking supports organizations that offer opportunities to Adults and Transitioning Youth with Disabilities, Elders, Foster Youth, and Veterans and Military Families, primarily in the 14 Western United States (Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Texas, Utah, Washington, and Wyoming) and in British Columbia, Canada. Most Trust grants fund direct services intended to develop the capacity of individuals to realize their full potential, promote self-sufficiency, and improve their quality of life. A large percentage of these grants are for general operating support. In addition, the Trust also supports organizations working to bring about changes in systems, policies, and/or behaviors that contribute to improved well-being and opportunity for its focus populations.

The Trustees, CEO, and staff work collaboratively in a team-oriented environment and are guided in all activities and grantmaking by the values and beliefs of Respect, Humility, Interdependence, Stewardship and the Dignity and Potential of every individual. The financial assets of the Trust are valued at approximately \$500 million. Trust grantmaking in 2020 totaled nearly \$25 million including \$4,000,000 in additional funding to address the effects of the COVID-19 pandemic on Trust grantees, a commitment that continues in 2021.

About this Opportunity

The Trust is seeking a Finance and Operations Manager. Reporting to the Director of Grants Management (DGM), with a dotted line to the Chief Executive Officer (CEO), the Finance and Operations Manager (FOM) is a new role at the Trust and presents a unique opportunity for the ideal candidate to work collaboratively with the grants management and leadership teams to support the Trust's grantmaking and related administrative functions. The FOM will work with the DGM to support grant payment processing and related financial reporting and data management, as well as leading or supporting special projects to strengthen the Trust's grantmaking practices. The FOM will also work with the CEO to support daily financial, operations, and accounting tasks with the Trust's outsourced accounting service provider and external HR consultant, liaise with vendors and contractors, support the needs of the Trustees, and various other administrative duties.

Key Responsibilities

Please note the FOM duties described below are grouped according to teams and reporting relationships, however, in practice, routine overlap and active communication between these two functions and among all staff is to be expected.

Grants Management Support

- Works with DGM, grantees, and the Trust's accounting service provider to facilitate timely and accurate grant payments
- Monitors database for grant payment scheduling and for automated and custom payment-related communications
- Maintains accuracy of electronic grant records and documents for payment, audit, and reporting purposes
- Prepares and distributes monthly grantmaking financial reports
- Prepares and distributes annual audit and tax reports
- Assists with annual audit and tax preparation as directed and provides requested grant-related information to auditors and accountants
- Updates and maintains the Trust's website
- Works with grants management team on special projects including, but not limited to, data management, grantmaking practices, and office procedures
- Participates in training and professional development including internal and external team learning opportunities
- Other duties as assigned

Executive Support

- Manages all vendor invoices and bill payment processing through to CEO approval, ensuring bills are paid in a timely fashion
- Supports payroll and retirement plan administration
- Supports expense report processing and payments
- Liaises with all external vendors and contractors as it relates to invoices and provided services
- Liaises with third-party accounting firm on daily financial matters and on delivery of monthly financials for review and approval by CEO
- Supports human resource functions through ongoing engagement with external HR consultant and benefits broker
- Assists with preparation of Trustee meeting materials
- Attends Trustee meetings; writes and maintains Trustee meeting minutes
- Maintains affinity group memberships, annual renewals, and Trust subscription accounts
- Other duties as assigned

Core Competencies

- Experience working with, analyzing, and troubleshooting data and database reports
- Sensitivity and discretion when handling confidential information
- Diplomacy, tact, and professionalism when representing the Trust with third parties
- Ability to identify problems and proactively communicate and problem-solve
- Superb attention to detail and demonstrated ability to produce high-quality, accurate work
- Excellent written and oral communication skills and dedication to clear team communication
- Strong organizational skills, and ability to multi-task, meet deadlines, and adapt to changing priorities

- Flexibility to work collaboratively in a team environment while also owning one's responsibilities and working with minimum supervision
- Willingness to learn from mistakes and apply feedback
- Dedication to the Trust's mission and to its values of Respect, Humility, Interdependence, Stewardship and the Dignity and Potential of every individual
- Willingness to actively participate in the Trust's diversity, equity, and inclusion efforts
- Commitment to continuous improvement, learning and growth
- An open mind and a deep commitment to respecting diverse viewpoints

Key Qualifications

- At least five years' experience in finance, accounting, operations, administration or combination thereof required, with professional experience in philanthropy, non-profit, or other social sector work a plus
- Advanced computer and technical literacy; proficiency in Word, Excel, Outlook, and with database/information management systems; experience with Bill.com a plus
- Understanding of basic principles of financial accounting
- Familiarity in supporting all aspects of human resources and benefits administration
- Basic understanding of laws and regulations related to private foundation grantmaking

Physical Demands / Work Environment / Travel

The Trust is based in the San Francisco Bay Area but utilizes a hybrid remote work model. A strong preference is for the successful candidate to be located in one of the 14 Western United States detailed above. Employees based in the Bay Area may work in the Trust's office as often as they wish, but all staff are required to be in the office six times per year for groups of consecutive Core Days, including staff and Trustee meetings. Employees based outside of the Bay Area will be required to travel for these Core Days. Additional travel for conferences and meetings may be required, as necessary, to carry out the responsibilities and duties of this job. Anticipated travel requirements are 10-20%. While performing the duties of this position, the employee is required to spend extended periods of time at a computer and to communicate via phone, video conference, and email.

How to apply:

Interested candidates should send a cover letter and resume to careers@smithct.org with "Finance and Operations Manager" in the subject line. No phone calls please. The initial review of applications will begin on **August 6, 2021**; however, applications will be accepted until the position is filled. All applications submitted will be considered, but only those candidates demonstrating a suitable combination of the competencies and qualifications described above will be contacted for next steps. Interviews, if invited, will be conducted online. Final candidates will be asked to provide three relevant employment references, and to verify authorization to work in the United States.

Equal Opportunity Employer

The May & Stanley Smith Charitable Trust is an equal opportunity employer committed to fostering a diverse and inclusive team with a wide range of life experiences, perspectives and capabilities. The Trust does not discriminate based on race, ethnicity, religion, national origin, ancestry, gender, sexual orientation, gender identity, gender expression, age, marital status, status as a veteran, or status as an individual with a disability, or any statuses protected by law. Qualified applicants with lived experience in any of the Trust's focus populations are strongly encouraged to apply.