

POSITION ANNOUNCEMENT

FINANCE DIRECTOR



Rancho Santa Fe
FOUNDATION
NORTH COUNTY'S HOME FOR IMPACTFUL GIVING

WHAT WE DO

For over 40 years, Rancho Santa Fe Foundation (RSFF) has provided a high level of service by developing personal relationships with our donors and providing exceptional stewardship of the funds invested with us to ensure great community impact for North County San Diego. With nearly \$150 million in assets under management, we are committed to supporting the charitable giving of donors and nonprofit organizations. The assets support an ever-broadening array of activities that ensure the effectiveness of the Foundation's mission. Our work is built on five core values:

- **We Believe in Relationships** - We deeply value the relationships of our donors, professional staff, volunteers, and nonprofit partners.
- **We Practice Stewardship** - We provide exceptional governance, fiscal management, and guidance to our donors and nonprofit partners.
- **We Achieve Excellence Together** - Together we are stronger, through collaboration, community leadership, and a shared vision.
- **We Do the Right Thing** - Ethical behavior is an essential part of our success.
- **We Care** - We are invested in the outcomes and impact to the communities we serve.

Through our grants and programs, we make strategic investments to address unmet or emerging community needs. RSFF manages 381 funds created by philanthropic-minded individuals and families, along with forward-thinking nonprofit agencies. Since 2000, we have awarded more than \$138 million in grants to nonprofit organizations globally. As we grow and look to the future of San Diego County, we continue to envision and implement ways to build community in our region.

LEADERSHIP & CULTURE

The Finance Director will report to our Interim President & CEO / COO, Karen Sprigle, a respected leader in the philanthropic community, with nearly 20 years of nonprofit leadership experience. Karen is passionate about building cultures that align the strengths and talents of employees with the goals of the organization and takes great pride in supporting her team, developing strong relationships, and implementing solutions that ensure efficiency and impact. Prior to joining RSFF in 2017, Karen served 13 years as COO at United Way of San Diego County, following a successful career in the financial services industry. The Director will join an energetic and exceptionally talented team of seven staff working collaboratively to connect donors to regional and global needs through visionary community leadership, personalized service, and effective grantmaking.

COMPENSATION & BENEFITS

- Salary – \$120,000 - \$130,000
- Medical, dental, and vision coverage
- 401(k) Match
- PTO: 12 paid days off (increasing to 24 after 3 years of service), 12 paid holidays, 4 paid hours per month of paid volunteer time

LOCATION

This is a hybrid role with an office located at 162 S. Rancho Santa Fe Road, Encinitas, CA 92024. Employees work onsite a minimum of two days a week. To ensure that RSFF staff have collaborative time together, all staff are onsite every Monday.

POSITION SUMMARY

The Finance Director will work closely with the Board of Directors, including our Audit, Investment, and Finance committees, provide support to RSFF's Charitable Special Assets Fund (CSAF), and supervise our Staff Accountant. They will have overall strategic and operational responsibility for finance, IT, and facilities. The position has the opportunity for growth in other areas, including management of HR and other outsourced service providers. A key sounding board and thought partner to our senior leadership team, the Director will work across every area of the Foundation, including organizational planning, development, and assessment activities. This position is an excellent opportunity for a dynamic, charismatic, leader to play a significant role in building stronger communities in North County San Diego.

Priority areas in the first 12 months include:

- Become familiar with our software platforms: Foundant's CommunitySuite (finance, accounting, and CRM), and GLM (grants management); make recommendations as to how we can fully utilize their capabilities.
- Analyze our current organizational structure, with a focus on accounting and finance systems and workflows; recommend opportunities for streamlining and modernization.
- Support the development and implementation of the financial components related to our various funds and grant cycles.
- Support the budgeting process, incorporating our new fee structure.
- Prepare for the annual audit.
- Provide strong financial and strategic support to the senior leadership team.

DUTIES & RESPONSIBILITIES

- In conjunction with the CEO and COO, conduct long and short-term organizational and fiscal planning.
- Prepare budgets for contracts, programs, and projects.
- Monitor legal and tax developments pertinent to community foundations and take appropriate actions as needed.
- Maintain the fund accounting system for individual funds.
- Ensure compliance with all fiscal contractual obligations.
- Proactively manage financial records, providing monthly and quarterly financial management reports, including financial analysis and cash flow projections.

- Maintain investment accounts, initiating brokerage trades through RSFF custodian based on asset rebalance; prepare asset allocation and investment performance reports.
- Present monthly financial reports to the Board of Directors.
- Provide staff support to the Board, Treasurer, and Board Committees.
- Oversee the distribution of all grant funds.
- Support the Audit Committee with all audit-related activities, including the preparation and filing of tax returns.
- Monitor insurance policies and engage the COO in an annual review.
- Manage IT vendor relations.
- Supervise, coach, and mentor staff to achieve individual and organizational success.
- Anticipate organizational needs and proactively propose solutions.
- Actively communicate with staff to ensure that they have the tools, training, and direction needed to be effective in their jobs.
- Embrace professional development opportunities to further develop job-related knowledge and skills.

BACKGROUND PROFILE

- Demonstrated experience in fund accounting and investments.
- Strategic and hands-on approach to finance, accounting, and operations; adept at analysis, business planning, forecasting, and investments.
- Accounting and finance experience with nonprofits or community foundations is a plus.
- Demonstrated experience with audit, legal compliance, and budget development.
- Successful management experience in overall business operations, including direct fiscal/operations, facilities management, and employee and vendor relations.
- Strong organization and prioritization skills with the ability to manage several projects simultaneously, with exceptional attention to detail.
- Highly self-actualized with strong initiative-taking; motivated, with a positive personality and excellent follow-through.
- Effective communication skills, written and oral; comfortable communicating key data, including presentations to senior management, the board, and outside stakeholders/partners.
- Ability to synthesize and translate complex financial data and concepts.

FOR MORE INFORMATION OR TO APPLY, PLEASE CONTACT:

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