



Sierra Club Foundation Chief Financial Officer Position Description

The Sierra Club Foundation seeks a seasoned and highly collaborative Chief Financial Officer to oversee all fiscal and financial responsibilities of the Foundation, in collaboration with the Executive Director and Board of Directors.

About the Foundation

The Sierra Club Foundation promotes efforts to educate and empower people to protect and improve the natural and human environment.

The Foundation's work is guided by these goals:

- Solve the climate crisis and quickly transition to a resource-efficient, clean energy economy that better serves people and nature;
- Secure protections for public lands and waters, promote healthy ecosystems and communities, and fight for clean air and water;
- Expand opportunities for more people to explore, enjoy, and protect the planet by supporting programs and policies that reach across economic, cultural, and community lines to get people outdoors; and
- Build a diverse, inclusive environmental movement that reflects and represents today's American public and prioritizes important connections between environmental health and social justice.

As the fiscal sponsor of the charitable programs of Sierra Club, the Foundation provides resources to it and other nonprofit organizations to support scientific, educational, literary, organizing, advocacy, and legal programs that further its goals.

For more information on the Sierra Club Foundation, please visit www.sierraclubfoundation.org.

The Opportunity

Reporting to the Executive Director and serving as a member of the senior management team, the CFO provides strategic leadership for the organization's financial assets and investment portfolios.

The CFO supervises a high functioning Finance Team that includes a Senior Accountant, Bookkeeper, and Finance Coordinator. This team oversees the financial operations of the Foundation, including but not limited to cash and investment management, budgeting, financial reporting, financial and insurance contracts, gift acceptance issues, management of planned giving program administration, endowments, gifts of real estate, and accounting-related information systems of the organization.



The CFO serves as the lead staff for the Finance, Investment and Audit Committees of the Board of Directors. The CFO works closely with the Executive Director and Grants and Compliance Director in ensuring that the fiduciary responsibilities of the Foundation are fulfilled.

Key Responsibilities

Strategic leadership

- Identify priority needs and develop strategic options for effectively addressing those needs.
- Manage and hold accountable financial and investment consultants.
- Represent the Foundation at relevant conferences and events and inspire others to focus on mission and program related investing to address climate change and social inequities.

Staff Management

- Manage, mentor and develop a direct team of three, managing work allocation, training, problem resolution, performance evaluation, and the building of an effective team dynamic.

Financial and Cash Management

- Prepare and report to the Board of Directors on a quarterly basis on progress toward achieving the annual budget.
- Develop and implement accounting-related policies and guidelines.
- Support ongoing maintenance of accounting software and reports.
- Project cash liquidity needs using forecasts and other available information.

Investment Management

- Monitor and report on investment performance to the Board of Directors on a quarterly basis.
- Develop and implement investment policies and guidelines for the Foundation's portfolios.
- Work to achieve investment goals around mission-related and impact investments in the Foundation's portfolios.
- Manage relationships with investment consultants and asset managers.

Planned Giving – Bequests and Life Income Gifts

- Oversee the Planned Giving Program investment management and administration managed by the Foundation's planned giving consultants.
- Work collaboratively with Sierra Club's Gift Planning staff and outside attorneys on estate gifts.
- Analyze planned gifts to make acceptance recommendations to the Executive Director and Board on a quarterly basis.
- Develop and implement planned gift policies and procedures.



- Oversee general program administration, including required government filings and reports to beneficiaries.
- Work with consultants on the preparation of Planned Giving program and investment reports for review by the Investment Committee and filing with the Department of Insurance.

Endowments

- Develop and implement endowment policies, including those related to investments.
- Supervise reconciliations of endowment funds, maintenance of endowment reports and annual spending distributions.
- Coordinate the annual endowment mailing and other communications with beneficiaries.

Human Resources

- Ensure the Foundation complies with all relevant employment law and that the employee handbook reflects all current policies and laws.
- Update the compensation policy, as needed.
- Maintain and update salary survey data and salary ranges, at least bi-annually.
- Maintain employee records as required by California law.
- Serve as administrator of the Foundation's 403(b) plan.

Other Responsibilities

- Negotiate real estate transactions for real estate gifts in accordance with relevant policies for outright and planned gifts.
- Procure directors & officers and corporate liability insurance for the Foundation annually.

Experience and Qualifications

The successful candidate will have:

- A Bachelor's or Masters' Degree in Accounting, Business or Public Administration. CPA certification.
- Seven to ten years financial and investment management experience in a nonprofit public charity or a private foundation.
- Five to seven years successfully supervising and coaching staff.
- Success in engaging and collaborating with nonprofit board members.
- Success providing strategic leadership for staff and volunteers.
- Proven experience retaining and managing financial and investment consultants to achieve desired results.
- Proven verbal, written and public presentation skills.



- Excellent computer skills, i.e., should have a high level of skill in Microsoft Office and Windows, Google suite of applications, ability to learn proprietary systems, and the ability to manage financial and Constituent Management Systems reporting needs. Knowledge of Netsuite is highly desired.

Personal Attributes

The successful candidate will have:

- A strong commitment to advancing the mission and vision of the Sierra Club Foundation.
- A high degree of self-awareness and emotional intelligence.
- Strong interpersonal skills and ability to work in a collaborative and transparent manner effectively with Board members, Foundation staff, and Sierra Club colleagues.
- A commitment to and practice of producing detailed and precise work.
- Strong listening and perspective-assessment skills.
- Ability to exercise good judgment during times of ambiguity.

How to apply

If you are interested in applying or wish to nominate someone for this position, please send a cover letter and resume in confidence to search@blueridegadvisorsllc.com.

Sierra Club Foundation is an equal opportunity employer committed a diverse workforce.