



THE 360 GROUP
— EXPECT THE UNEXPECTED —

Rockefeller Philanthropy Advisors

Chief Financial Officer

Position Description & Candidate Profile

Chief Financial Officer

Location

RPA's offices in New York, Chicago or San Francisco would be preferred

Reports to

Senior Vice President & COO

Our Client

Rockefeller Philanthropy Advisors (RPA) is a nonprofit organization that currently advises on and manages nearly \$800 million in philanthropic activity by individuals, families, corporations, foundations and fiscally sponsored projects. Continuing the Rockefeller family's legacy of thoughtful, effective philanthropy, RPA remains at the forefront of philanthropic growth and innovation, with a diverse team of experienced grantmakers, grants managers, and fiscal sponsor administrators with significant depth of knowledge across a spectrum of issue areas, both in the US and abroad. Founded in 2002, RPA has grown into one of the world's largest philanthropic service organizations and has facilitated more than \$3 billion in grantmaking to more than 70 countries. RPA currently serves as a fiscal sponsor for a wide range of projects, providing governance, management and operational infrastructure to support their charitable purposes.

RPA's work accelerates philanthropy in pursuit of a just world, providing deep global expertise to make philanthropy more thoughtful, equitable and effective. Guiding all of its work, RPA's core values are:

- Philanthropy can help create a better world
- Decisions should center people and communities
- Philanthropy has a responsibility to pursue equity
- The highest standards of integrity and trust are essential
- Learning and sharing knowledge is an important responsibility to the field

Moreover, Rockefeller Philanthropy Advisors celebrates the uniqueness of its staff, its partners, and the communities it serves. RPA is committed to inclusion with the goal of cultivating a culture of belonging and acceptance. RPA strives to embed this value in its philanthropic work to advance a more just, equitable and sustainable world.

RPA has a team of more than 80 professionals (not including the employees of sponsored projects, which adds considerably more headcount). The CFO will specifically oversee a finance and accounting team of 14 (and growing) that services sponsored projects and RPA's advisory and consulting services. RPA is governed by a board of 19, with which the CFO will work closely on financial, investment, and audit matters, providing clarity, direction and vision for RPA's overall health and future.

Learn more about Rockefeller Philanthropy Advisors at <https://www.rockpa.org/> !

Position Responsibilities

The Chief Financial Officer will serve as a communicative thought partner and be responsible for financial planning, reporting, asset management, development of systems and procedures, team management, and managing the financial risks of the association. It will be critically important for the CFO to work collaboratively and closely with the whole team to provide financial transparency and outstanding service to sponsored projects and advisory services. The CFO is part of the senior management team which stewards and advances RPA in both mission and financial health, and will serve as an officer of RPA, staff the finance and audit committees, attend all board meetings, and have regular access to the CEO and all other RPA officers.

Specifically, the Chief Financial Officer will:

Finance and Accounting

- Monitor monthly financial operations and provide guidance to executive and operating staff; work closely with operations staff on issues that affect financial outcome
- Assist operations in finance operational strategies by completing financial modeling, establishing critical measurements, resolving problems, and implementing change for RPA
- Provide independent perspective on business decisions to ensure that they are financially grounded and support RPA's strategy and execution
- Work directly with the Finance Chair and Committee(s) of the board to deepen volunteer relationships, develop policies, monitor their implementation and meet the related needs of the board
- Review, update, and/or develop internal control systems for RPA and oversee internal audits which check for compliance on a variety of policies and standards

- Manage endowment funds, under the direction of the Finance Committee, and within the risk tolerance expressed by the Board via the asset allocation policy
- Oversee preparation of financial reports and tax returns
- Oversee the development of the annual operating budget and long-term forecast
- Oversee and certify the annual audit and meet periodically with the outside auditors to maintain communications and keep them informed of changes in RPA
- Work closely with sponsored projects to ensure that their budgets are well-planned, realistic, and timely
- Play key role in the oversight of financial risk of the overall enterprise
- Monitor and maintain good working relationships with external partners including auditors, bankers, investment counselors, attorneys and other professional advisors
- Ensure that RPA and its sponsored projects comply with all legal, ethical, and accounting standards

Executive and Team Leadership

- Oversee the operations of the accounting/finance and payroll departments
- Understand complexity of the organization while providing strategic thinking that can balance finances with organizational priorities and growth
- Along with the executive leadership team, work across the organization to develop RPA's annual operating budget
- Build, mentor, and lead the finance and accounting team to cultivate a dynamic culture and ensure professional growth
- Understand gift and fund options available for donors and assist – in partnership with development, donor services, executives, and other departmental staff – in evaluating proposed gifts for adherence to RPA's policies
- Work collegially with the rest of the executive leadership team to incorporate RPA's mission and values into the organization's vision and strategies
- Advocate for and institutionalize inclusion and diversity throughout the organization
- Remain current and knowledgeable about relevant legal, accounting, tax, audit, treasury, insurance, real estate, data security and public policy matters
- Work closely with the Board of Directors to provide leadership, information, and support that enhance the governance of RPA; assess risk on an ongoing basis

- Ensure that RPA's sponsored projects continue to receive excellent customer service, while working with the staff to identify and implement ways to streamline workflow and increase efficiency, with a specific eye on using technology to do so
- Sustain the highest level of effectiveness and efficiency through hiring, training, and motivating staff as well as through internal controls, budgeting and finance; facilitate and support highly effective teams, and a strong staff overall

Profile of the Successful Candidate

Rockefeller Philanthropy Advisors is committed to having a diverse workforce to promote effective working relationships with a wide variety of stakeholders and partners. RPA seeks a leader with strong financial and strategic acumen; a commitment to the power of philanthropy, innovation and the common good; strong curiosity and the desire to continue learning; a collegial work style; a sense of humor; and the dedication to work hard toward RPA's mission of promoting philanthropy.

Within this framework, RPA seeks a Chief Financial Officer with the following attributes:

- Fluency in financial strategy, trends and reporting
- Knowledge and understanding of general business matters required including budget development, financial reporting, GAAP, cash management, financial nonprofit laws and regulations (including fiscal sponsorship), business taxes, banking and debt financing instruments
- Excellent interpersonal and communication skills, as well as emotional intelligence
- Demonstrated experience in effectively identifying, encouraging, managing, developing a strong staff team
- An abiding commitment to diversity, inclusion, access and equity
- Experience working with many different constituencies or stakeholders ranging from the Board of Directors to volunteers
- Experience with integrated grants and accounting systems; excellent working knowledge of office and enterprise systems technologies
- Ability to effectively and persuasively communicate with the board, executive team, broader staff, and external contacts
- Demonstrated interest in philanthropy and in serving community needs
- Minimum of ten years with senior-level management experience within finance and/or accounting departments, non-profit experience preferred

Additionally, the successful candidate will likely have:

- Nonprofit experience
- Advanced degree in business, finance, or accounting, or an equivalent combination of education and experience (preferred)
- CPA certification (highly desirable)

Start Timeframe

We seek to have someone in place in Fall 2022.

Compensation

This position offers a competitive salary and includes a comprehensive benefits package. We actively welcome all candidates from a wide range of backgrounds who have the skills to fulfill this role – regardless of compensation history.

To Apply

All applications are held in strict confidence. Please submit your credentials and a letter of interest through our private applicant portal to The 360 Group at:

<https://the360group.us/portal/>

Applications should be directed to the attention of Vincent Robinson, Managing Partner or Maureen Capitolo, Principal. Applications will be reviewed on a rolling basis. Earlier applicants may receive priority consideration. To be considered, The 360 Group encourages all interested candidates to submit their applications promptly, via the confidential applicant portal linked above.

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.

Learn more about The 360 Group at the360group.us.