



**WAVERLEY ST FOUNDATION**

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## **WAVERLEY STREET FOUNDATION**

### **DIRECTOR OF FINANCE (MOST SENIOR FINANCE ROLE)**

<https://www.waverleystreet.org>

#### **The Organization:**

Waverley Street Foundation (WSF) builds and supports solutions at the intersection of climate change and community priorities, focusing on efforts and initiatives that draw connections between urgent local and community-based issues—including housing, transportation, food security, and more—and the health of our planet. The Foundation is especially eager to partner with communities that are already enduring severe impacts of climate change and that deserve a central place in solutions. WSF prioritizes representation, diversity, equity, and inclusion in all facets of its work.

Unlike most philanthropies, WSF will spend down its assets—approximately \$3 billion—over the next 9 years, a decision that empowers it to support not only sensible and pragmatic solutions but also daring bets and breakthroughs that can alter the trajectory of the climate crisis and unlock a new and better future for humanity.

WSF strives to do things differently, and be entrepreneurial and innovative in our grantmaking approach. As we take on the task of addressing global climate change, we are adopting a campaign mindset where we look to empower people and communities to ensure that their governments adopt and implement climate friendly policies. Starting with some of the highest emitting nations, the goal is to demonstrate the collective will of humanity to reside on a livable planet, and to develop momentum for climate improvements across the globe that results in a global transition to clean energy sources and sustainable living.

WSF does its work in deep collaboration with field experts and advisors, as it is essential that the Foundation's strategy is developed not in conference rooms but out in the world, informed by the lived experiences and innovative ideas of the people most directly impacted by the problems the foundation seeks to address. Specifically, WSF convenes experts from a variety of disciplines who are close to communities – their experiences, and their solutions.

In order to execute against our ambitious goals, we are seeking a Director of Financial Strategy and Planning to join our team.



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**The Role:**

**Location:** San Francisco, CA  
WSF operates on a hybrid basis, with a requirement of 3 days per week in office

**Reports to:** Chief Operating Officer

**Overview:** Waverley Street Foundation is seeking an experienced Director of Finance to report directly to the Chief Operating Officer and lead the organization's finance function. In this influential role, you will be responsible for overseeing comprehensive financial planning, budget and management of an annual budget of \$350M.

Your responsibilities will extend to playing a pivotal role between the Asset Management (responsible for \$3B endowment), Grants Management, and Program teams. This involves providing the necessary financial tools and guidance to ensure financial planning aligns seamlessly with available resources and overarching goals.

**Key Responsibilities:**

***Financial Planning & Analysis (FP&A)***

- Drive the annual budgeting process in collaboration with stakeholders to ensure alignment with organizational goals using measurable metrics.
- Conduct annual long-range planning to guarantee that the spend-down aligns with the WSF's mission and goals.
- In collaboration with the Asset Management team, support high level reporting on the overall portfolio.
- Prepare and present accurate financial reports to the board of directors, emphasizing key financial metrics and offering strategic recommendations.
- Develop and refine high-quality management reports and decks.
- Create clear and compelling material to effectively communicate high-level financial plans to non-finance audiences.

***Reporting & Analysis***

- Own periodic reporting by consolidating raw data from multiple sources, providing a holistic perspective on the organization's initiatives, and recommending the best course of action to execute the WSF's goals.
- Identify variances between actual and budgeted financial results at the end of each reporting period, communicating strategic implications to the management team.
- Review and recommend long and short-range budget plans for departments in alignment with WSF's overall objectives.
- Analyze and implement resource allocations and budget requirements for the execution of the approved operating budget.



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***Regulatory Compliance***

- Stay informed about changes in accounting standards and non-profit regulations, adapting financial strategies accordingly.
- Coordinate with our external accounting team and auditors, as needed.

**The Person:**

**Qualifications:**

- 10+ years of progressive experience in corporate finance, accounting, or related analytical fields.
- Deep knowledge of non-profit accounting principles, regulations, and compliance.
- Financial strategy and planning experience gained in a philanthropic organization is required, preferably a large organization.
- Key thought partner and collaborator with leadership team working to advance strategic priorities through pragmatic optimism.
- Exceptional communicator with the gravitas and EQ necessary to educate, influence, and gain trust across a diversity of stakeholders.
- Familiarity with investment accounting principles and performance reporting processes for investment portfolio is a plus.
- Great judgment and meticulous attention to detail.
- Entrepreneurial mindset, highly adaptable to rapidly changing priorities and able to manage multiple deadlines and priorities.
- Comfort with both ambiguity and change.
- Excellent track record of hands-on leadership working with a diverse team in a fast-paced environment.
- Comfort working in a hybrid office setting where teamwork and resourcefulness are highly valued.
- Highly motivated, proactive work style and excellent organizational skills.

**Key Attributes for Success at WSF**

- Passionate about advancing equitable and transformative solutions to the climate crisis and to communities.
- Fostering a culture of accountability, transparency, and continuous improvement.
- Able to synthesize information and distill complex ideas into clear, concise, and actionable forms.
- Proven track record within complex, multi-stakeholder projects/organizations.
- Skilled at building strong relationships and cultivating diverse networks.
- Humble and open to differing views and perspectives.
- Intellectually curious and stays current on news in their field.
- Able to break down barriers to getting things done, while always operating with unassailable integrity.
- Willing to pitch in when needed.
- Low drama, good humor and joie de vivre.



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**Education:**

- Bachelor's degree in accounting, finance or related fields. Advanced business or finance degree preferred.

**Compensation:**

- The salary range for this position is \$225,000-\$275,000. The exact offer will be determined by a variety of factors such as the candidate's individual skills, qualifications, and experience relative to the requirements of the role.
- In addition to salary, this position includes a comprehensive benefits package that includes health, dental, and vision insurance, 401(k) plan with employer match, paid time off, and other perks.

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To learn more about this opportunity, please contact:

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