



Job Description:

F. M. KIRBY FOUNDATION – DIRECTOR OF FINANCE / TREASURER

About the F. M. Kirby Foundation:

The F. M. Kirby Foundation is a family foundation which aims effectively to manage and utilize that which has been entrusted to it over multiple generations of the Kirby family. It strives to make thoughtful and prudent philanthropic commitments to highly selective grantee partners. The goal of the foundation is to invest in opportunities that foster self-reliance or otherwise create strong, healthy communities. The Foundation's grantees are largely located in geographic areas of family significance and are engaged in one of the seven areas of interest: arts, culture, and humanities; education; environment and animals; health; human services; public affairs; and religion.

About the Position:

The Director of Finance is responsible for the overall financial stewardship of the F. M. Kirby Foundation. As such, this leader will oversee day-to-day financial operations, while also ensuring that the foundation's financial and investment policies and procedures will help achieve near- and long-term charitable objectives. The Director will directly oversee several processes critical to the Foundation's success, including, but not limited to, developing and maintaining the annual budget, preparing for the annual external audit, filing tax returns, maintaining an appropriate cash position, and ensuring fidelity to internal controls. In order for the organization to achieve its charitable mission, the Director's stewardship of the Foundation's investments – in partnership with an Investment Committee – is of critical importance. The Director of Finance will report to the Executive Director.

Responsibilities:

Finance & Accounting

- Maintain general ledger, review and approve invoices, and track administrative expenses;
- Prepare and maintain Foundation's yearly budget, in collaboration with Program Officers and the Executive Director;
- Ensure fidelity to internal controls and financial procedures across the Foundation;
- Oversee accounting and payroll activities, in collaboration with the Executive Assistant;
- Compute quarterly estimated taxes;

- Prepare periodic financial reports for Foundation team and Board;
- Ensure compliance with legal and regulatory requirements regarding required charitable distributions and other obligations;
- Prepare, in partnership with the Foundation's Board Chair, the Annual Report;
- Work with Executive Director to align financial planning and procedures with organization's strategic plan;
- Participate in industry and census bureau surveys;
- Act as principal liaison for external audit and in the preparation of annual tax returns.

Investments

- Act as principal liaison to the Foundation's investment managers;
- Track and record all investment activity by portfolio managers and custody bank via Black Diamond platform;
- Create and maintain various investment reports, including portfolio and manager performance, peer ranking comparisons, Investment Policy Statement compliance, performance attribution analysis, and other ad hoc reports;
- Partner with Investment Committee to prepare for quarterly meetings; research new opportunities; and align Foundation's investment strategy with near- and long-term charitable goals;
- Stay informed of global trends, policy and legislation, and micro- and macro-economic forecasts that may impact the Foundation's investments or grantmaking.

Grantmaking & Operations

- Support staff in performing financial due diligence on grantees during the grant review process;
- Support Board of Directors' Audit and Compensation committees;
- Oversee Foundation's 403b program and prepare associated filings and reports;
- Work with Grants Administrator to prepare monthly grant payments and to ensure full compliance with internal controls and legal requirements of a private foundation;
- Partner with Grants Administrator in developing electronically transferred funds (ETF) payment capability;
- Oversee the Foundation's outsourced information technology provider;
- Develop cybersecurity policies and procedures and ensure fidelity across the organization;
- Assist in the development and improvement of the financial reporting fields for the Foundation's online grantee portal;
- Build and maintain strong and authentic relationships with grantee partners.

Preferred Qualifications:

The well-qualified applicant will:

- Have experience in stewarding the financial operations of an organization, preferably a non-profit or foundation;
- Have meaningful experience in accounting and with investments;
- Have earned an advanced degree or certificate in a related field, such as MBA, CPA, etc.;
- Share a demonstrable personal commitment to the Foundation's mission of fostering self-reliance and strong, healthy communities;
- Have superb interpersonal skills, with an ability to work respectfully and efficiently with a broad range of constituencies;
- Enjoy working with others, fostering talent, and contributing to the greater good of the team and the Foundation's areas of support;
- Possess a flexible mentality, sound judgment, an entrepreneurial habit of mind, and a natural curiosity;
- Share a commitment to continuing education and professional development;
- Be able to work efficiently and problem solve with technology;
- Be able to work onsite (Morristown, NJ) as well as occasionally travel, including out-of-state and overnight work-related trips.

Salary & Benefits

- Salary ranges from \$150,000 - \$190,000, depending on experience.
- Comprehensive benefits, including fully subsidized health, dental, and vision care
- 403(b) program, with 10% employer match
- Hybrid in-office / remote work schedule
- 15 days of paid time off, as well as 11 paid holidays and 2 paid volunteer days

To apply: Please send a cover letter, resume, and list of three references to kam@fmkirby.com. Please include in e-mail subject: "Application for Director of Finance Position."

Application deadline: Applications will be considered on a rolling basis until the position is filled.

The F. M. Kirby Foundation provides equal opportunities to all employees and applicants for employment without regard to race, religion, color, age, sex, national origin, sexual orientation, gender identity, genetic disposition, neurodiversity, disability, veteran status or any other protected category under federal, state and local law.