

The logo for Evelyn & Walter Haas Jr. Fund is displayed within a dark teal rectangular box. The text "evelyn & walter" is in a light teal, lowercase, sans-serif font. Below it, "HAAS JR. fund" is in a white, uppercase, sans-serif font.

evelyn & walter HAAS JR. fund

Senior Associate, Grants and Data Management Position Description

The Evelyn and Walter Haas, Jr. Fund works to advance equality and justice so every person can thrive and live life with dignity and hope. Rooted in the Bay Area, the Haas, Jr. Fund is guided by an enduring set of core values. These values reflect the founders' vision and shape everything the Haas, Jr. Fund does.

- **Inclusion:** We celebrate the rich differences in human identity and embrace the perspectives of all people.
- **Respect:** We are guided by the wisdom and voices of people and communities working for change.
- **Collaboration:** We believe in the transformative power of working together to advance a shared vision.
- **Courage:** We take a stand to make a deep and lasting difference on urgent social issues.

About the Evelyn and Walter Haas, Jr. Fund

The Haas, Jr. Fund focuses on improving the lives of community members in the Bay Area and California. Among our priorities: building a fairer, more representative democracy in California; advancing more humane approaches to immigration and expanding opportunities for immigrant youth and families; and making higher education more affordable for lower-income California students. For more information, visit haasjr.org.

The Haas, Jr. Fund has 18 staff and assets of approximately \$460 million. Located in downtown San Francisco, it has awarded over \$700 million in grants since its founding in 1953. In 2023, the Haas, Jr. Fund paid out 410 grants totaling \$24.2 million. The Haas, Jr. Fund is continually seeking to adapt its grantmaking to better meet the needs of its grantees, including through the adoption of trust-based philanthropy and other innovative practices.

The Haas, Jr. Fund aspires to build an organizational culture that is inclusive and that allows all of us to live our individual values. We are a learning organization that is committed to diversity, equity and inclusion. We believe in our staff, we take care of each other, and we work to develop our colleagues' skills and help them grow. We collaborate to lift up good ideas and diverse perspectives while embracing innovative solutions. We work with passion and gratitude for the opportunity to make a positive impact and change people's lives.

Position Summary

The Senior Associate, Grants and Data Management position provides an excellent opportunity to work for a mission-driven organization, leveraging technology to enhance the grantee experience and advance equity goals.

The role involves a range of grants and data management responsibilities, centered on the Haas, Jr. Fund's Grants Management System (GMS). These include ensuring the integrity of grantee information, monitoring all grant awards and payments, assisting with legal and regulatory compliance, and developing and tracking performance metrics – while keeping in mind the needs and perspectives of the Haas, Jr. Fund's grantees. In addition, the role involves a wide range of reporting and analysis, with many exciting possibilities as the Haas, Jr. Fund seeks to utilize data to advance our equity goals. Collaboration with colleagues from all departments is an essential part of the role.

The Senior Associate coordinates the grants application cycle for the Haas, Jr. Fund's grantees, including maintaining the online portal through which applications are received, monitoring proposal information for completeness, ensuring grant approvals and grant agreements are appropriately documented, overseeing grant payments and reports, and ensuring grants are appropriately closed out.

The Senior Associate should be a well-organized, detail-oriented professional with experience in data management, an appreciation of the importance of information security, and an interest in analyzing data to uncover insights and areas for improvement.

This position reports to the Director of Finance.

Essential Functions and Responsibilities

The position has responsibilities in three primary areas: grants management; organizational data management; and compliance and special projects.

Grants Management

- Oversee all Haas Jr. Fund grantmaking, with responsibility for the quality and timeliness of all aspects of grants processing. Provide clear and concise grants administration policies and procedures for grantees and staff.
- Seek continuous improvements across the grantmaking cycle to improve the grantee experience, including the application of trust-based philanthropy principles, and improve grantmaking efficiency.
- Facilitate continuous monitoring and review of grant applications, grant agreements and award letters, grant reports, and related materials.
- Oversee preparation of all grantmaking reports and related analysis, including, but not limited to, payout projections, grants-related workflow, customer service, system maintenance, year-end reports, docket materials for board and committee meetings, and additional reports based on staff needs.

- Train new staff on the grant application portal and grants process. Act as in-house troubleshooter for the grants application process, grant projections, and grant data maintenance and reporting.

Organizational Data Management

- Serve as the primary administrator of the Haas, Jr. Fund's Grants Management System (GMS), and of related data systems covering organizational contacts and other areas, serving as a bridge as needed between Finance, Programs, Communications, HR, and other departments of the Haas, Jr. Fund.
- Lead ongoing efforts for the selection of a new GMS to replace the current system (foundationConnect, running on the Salesforce platform). Oversee the development and implementation of the new system, along with associated data migration, staff training, and integration with other Haas, Jr. Fund systems.
- Serve as the primary point of contact for inquiries regarding the grants database and the grant application portal, as well as grants administration in general.
- Manage all contacts in the organization's data system, including creating systems to ensure new contacts are added to the system and kept updated, and assist in the creation of email distribution lists.
- Provide guidance and support on data management practices and coordinate learning and training opportunities for staff across the organization.
- In collaboration with external IT partners, evaluate and implement emerging technologies and data management tools to enhance organizational efficiency and effectiveness in data processing and analysis.

Compliance and Special Projects

- Ensure the integrity of grant-related and other data by designing, implementing, and monitoring appropriate controls on data quality, including coordinating periodic data entry updates and using data cleaning tools.
- Stay current on relevant laws and regulations governing philanthropic grantmaking.
- Assist the Director of Finance with ensuring that the Haas, Jr. Fund's grantmaking is compliant with relevant IRS regulations and other legal requirements, including but not limited to review of the legal status of potential grantees and compliance with expenditure responsibility rules.
- Oversee the Haas, Jr. Fund's Grantmaking Manual, including drafting and updating grantmaking policies and procedures to improve grantmaking efficiency and to ensure compliance requirements are met.
- In partnership with the Director of Finance and Vice President of Programs, provide ongoing education for staff on grantmaking compliance issues.
- Contribute data and analysis for foundation publications and communications, including the Haas, Jr. Fund's website, social media, and other channels, and for internal and external surveys and reports.
- Any other responsibilities deemed necessary related to this role.

We seek a data-savvy professional with strong confidentiality and integrity, who can build good working relationships with all members of the diverse team at the Haas, Jr. Fund.

Knowledge, Skills and Abilities

- A demonstrated commitment to the Haas, Jr. Fund's mission and values, and the work of advancing equality and justice.
- Five or more years of relevant work experience. This could include working in a grantmaking or grant-funded organization, or working with a CRM or ERP system or in a data management role in a nonprofit, government, or business environment.
- Technical aptitude for managing core organizational systems and data. This could be evidenced by educational qualifications (e.g., a degree in MIS or similar), technical certifications (e.g., for Salesforce), examples from previous work experience, or any combination of the above.
- Intermediate to advanced skills in using project management tools and software, and in using Microsoft 365 apps (Word, Excel, PowerPoint, Outlook, and Teams) for project documentation, communication, and reporting.
- Ability to design, implement, and monitor workflow processes and procedures, and to make iterative refinements to achieve effective and efficient workflows.
- Ability to research and implement solutions to technical issues, and to show judgment in addressing unforeseen process, compliance, or system issues.
- Ability to pay attention to detail, while keeping in mind the big picture and paying attention to the needs of grantee and staff users.
- An understanding of philanthropy, grantmaking, and government regulations related to private foundations is considered a plus.
- Committed to continuous learning and improvement; takes initiative to solve problems and tackles glitches with enthusiasm and a 'can-do' attitude.
- Excellent writing, listening, and oral communications skills.
- Capable of building good working relationships across a diverse team, including an awareness of the nuances of race, ethnicity, gender, and sexual orientation.
- High level of flexibility and responsiveness with the ability to maintain workload and shift priorities quickly as organizational demands require.
- Compassion, empathy, a sense of humor, and a dedication to high-quality work.

Salary and Benefits

The salary range for this full-time position is \$90,000 to \$105,000 based on relevant knowledge, credentials, and experience. The Haas, Jr. Fund provides a comprehensive benefits package, including medical, dental, vision, and life insurance; paid time off; paid holidays; a 15% employer contribution to a 401a retirement plan; a mass transit subsidy; and volunteer and matching grant support. The Haas, Jr. Fund maintains a hybrid work policy that currently requires two days attendance per week in the downtown San Francisco office, plus attendance at organization-wide events.

To apply, email a cover letter, resume, and list of three references (candidates will be notified in advance of any outreach to references) to hr@haasjr.org. Use the subject line: Senior Associate, Grants and Data Management. Please submit PDF files only. Applications will be accepted until the role is filled.