

BRAKELEY SEARCH

LEADERSHIP SEARCH PARTNERS

POSITION SPECIFICATION

FINANCE LEAD

Maxwell/Hanrahan Foundation

San Francisco, CA

Brakeley Search

is a search firm focused exclusively on the nonprofit sector.

As a division of Brakeley Briscoe, Inc. (BBI), Brakeley Search works with local, national, and international nonprofits to help them hire exceptional senior-level leaders.

Managing Director, Scott Staub, ACFRE

is leading this search assignment. Inquiries may be made, in confidence, to Scott Staub at sstaub@brakeleysearch.com.

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TITLE: Finance Lead

ORGANIZATION: Maxwell/Hanrahan Foundation

LOCATION: San Francisco, CA

REPORTS TO: Operations Director

MAXWELL/HANRAHAN FOUNDATION MISSION

The mission of the Maxwell/Hanrahan Foundation is to support innovative people working in hands-on science, art and craft, teaching and protection of the natural world.

ABOUT MAXWELL/HANRAHAN FOUNDATION

The Foundation supports people who:

- **Explore and ask** through fieldwork in natural sciences.
- **Create and captivate** as they promote mastery in art and craft.
- **Teach and try** as they support students in public education.
- **Conserve and connect** as they encourage care for our food systems and the natural world.

Currently, the Foundation programs focus on Craft, Diversity & Inclusion in Art, Design and Computing, Earth Science, Field Biology, Food, Public School Teachers, and Resilient Ecosystems. In addition to grants, the Foundation makes unrestricted awards to individuals who demonstrate impact and originality in a subset of these programs, intended to provide recipients with funding, attention and support at a critical phase in their career.

The Foundation is based in San Francisco, California. The Foundation currently has a staff of seven. The Board of Directors is comprised of the founders, Delle Maxwell and Pat Hanrahan.

Discover extraordinary recipients and learn more about the Foundation at www.maxwell-hanrahan.org

ABOUT THE OPPORTUNITY

This role operates at the center of a “hub and spoke” model in which outsourced accountants, investment advisors, HR, and grant management partners must function in coordinated alignment with the Foundation’s mission and standards. This role offers a unique opportunity to join a Foundation poised to enter the next stage of growth. The Finance Lead’s work in the operating functions of the organization will ultimately make a difference for recipients and the work they do.

The Finance Lead plays a dual role supporting the Foundation's financial management and investment operations during a transformative growth phase. This role is not limited to maintaining accounting processes, but extends to strengthening them, building resilient processes and controls that ensure accuracy, transparency, and trust across all financial transactions.

With assets over \$500 million and growing, the Finance Lead serves as the connective tissue between internal leadership and a network of specialized outsourced partners, the role translates complexity into coherence. The Finance Lead ensures that information flows cleanly, financial decisions are well-informed, and execution across vendors, advisors, and consultants remains seamless and well-coordinated.

Key Responsibilities

Finance and Accounting

- ***Financial Management and Reporting***

- Support the Operations Director in translating complex financial data on a monthly basis into clear, accessible narratives and visualizations for communicating the Foundation's current financial position and future outlook to Directors, the Board and Audit Committee.
- Work with the Operations Director to assess existing external operational partners and needs of the Foundation as it grows. Assess the performance of vendors including external auditor, tax preparer and outsourced bookkeeper. Conduct RFPs for replacements if needed.
- Conduct financial modeling and analysis to support decision making. Summarize observations and recommendations on financial performance, trends and risks.
- Coordinate the annual audit. Set and manage audit timelines. Assure all schedules, control documents, investment valuation materials and grant support information are prepared with accuracy.

- ***Accounting and Internal Controls***

- Serve as the primary liaison with external accountants to ensure financial transactions are recorded, reconciled and documented accurately and timely.
- Maintain and document strong internal controls, including proper approvals, separation of duties and independent reconciliation in close communication and with the oversight of the Operations Director. Promote staff understanding of a strong internal control environment and recommend new policies/procedures as needed.

- Leverage emerging technologies to enhance the speed, depth and quality of financial analysis, including automating routine data consolidation, identifying patterns and anomalies in financial data.
- Review investment transactions, valuations and reconciliations related to banking and investment accounting in collaboration with external accountants.
- Assist with budget preparation and financial planning.
- Monitor financial policies and procedures and make recommendations to the Operations Director for process improvements, policy changes that align best practices and organizational needs.
- Manage accurate and timely processing of accounts payable and credit card administration.
- ***Payroll and Benefit Administration***
 - Prepare payroll using Paychex Flex.
 - Coordinate benefit administration with outsourced payroll and benefits administrator and serve as primary liaison for employee inquiries about payroll and benefits.
- ***Investment Operations (~30%)***
 - Coordinate investment operations between the Foundation management, Board, advisors and its Outsourced Chief Investment Officer (OCIO), ensuring effective communication, alignment and implementation of investment strategies as directed by the Board/Investment Advisory Board (IAC).
 - Manages cash flow and forecasting, in partnership with the OCIO and with input from the Executive Director/Operations Director on internal needs, preparing cash flow forecasts and analyses to ensure sufficient liquidity to meet grantmaking, operational and strategic funding requirements.
 - Liaise between the OCIO, custodians and accounting teams to ensure investment accounts are reconciled regularly, answer questions, respond to requests and provide compliance documents.

Professional Experience/Qualifications

Successful candidates will have thrived using their technical expertise and skills while also building relationships with internal and external stakeholders for shared understanding for successful outcomes.

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With strong expertise, judgment, and communication, success in this role calls for hands-on engagement with day-to-day financial operations and strategic thinking, serving as the steward of financial systems that move beyond compliance toward clarity, reliability, and infrastructure that is designed to support lasting growth and impact.

Experience:

- 5 to 10 years of progressively responsible experience in nonprofit finance, accounting, or investment operations required. Experience in a foundation, mission-based, or tax-exempt institution is strongly preferred.
- Strong knowledge of GAAP, nonprofit financial management, and private foundation tax compliance.
- Experience coordinating audits, managing budgets and conducting financial modeling and analysis.
- Familiarity with investment operations, including working with Outsourced Chief Investment Officers, investment advisory committees and mission-aligned investing.
- Proficiency with accounting and payroll systems and strong Excel skills.
- Skilled at synthesizing financial information for diverse audiences, including staff, board and committee members.
- Demonstrated ability to maintain internal controls and liaise with outsourced accounting and HR providers.
- A hands-on operator who is comfortable owning both the analytical and transactional dimensions of finance and accounting in a small-team environment while supporting the Operations Director who sets the strategic direction.

Key Competencies

- **Job Knowledge & Expertise:** Understands how financial, operational and investment systems interact and continuously looks for ways to streamline processes, mitigate risk and enhance clarity.
- **Project Management & Organization:** Exceptionally detail-oriented, with the ability to track multiple priorities, meet deadlines, and consistently produce accurate, high-quality work.
- **Critical Thinking and Judgment:** Demonstrates strong critical thinking and sound judgment in resolving problems, making timely decisions, and knowing when to escalate issues. Demonstrates discretion with confidential matters.
- **Flexibility & Adaptability:** Comfortable shifting priorities and handling emerging needs in a lean, evolving organization. Remains flexible and open to new ideas and is able to adjust effectively to changes in work processes, team dynamics, and organizational goals.
- **Communication and Relationship Management:** Strong written and verbal communication skills. Ability to build and maintain strong, trust-based relationships with

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diverse external and internal stakeholders, balancing responsiveness with professionalism and discretion, ensuring timely deliverables and alignment with organizational standards.

- **Initiative & Work Ethic:** Proactively anticipates needs, takes ownership of tasks, and is able to work independently and collaboratively, applying feedback to improve performance.
- **Teamwork:** Comfortable in a collaborative, team-oriented environment and works in support of shared goals. Builds positive working relationships, contributes to an inclusive workplace and is open to feedback and new ideas to resolve challenges and improve outcomes.

Education:

- Bachelor's degree in accounting, finance or related field required.
- MBA or CPA is highly preferred.

COMPENSATION

The starting salary range for the Finance Lead is \$170,000 to \$191,700 depending on skills and experience. The full salary range is \$170,000 to \$255,000 and reflects long-term growth potential within the role. A highly competitive compensation benefits package will be made available to the qualified candidate.

The Foundation operates on a hybrid work schedule, with an expectation of being in the office at least 25% of the time per quarter (approximately 2-3 days per week). Candidates must live in the Greater San Francisco Bay Area and be legally authorized to work in the United States.

TO APPLY

Brakeley Search is conducting this search on an exclusive basis on behalf of the Maxwell/Hanrahan Foundation. Interested candidates should apply via email by sending a resume and a letter outlining qualifications as a single PDF or Word document to Chelsea Burr at CBurr@BrakeleySearch.com with M/H Foundation in the subject line.

Overview of the interview process:

- Screening interviews by Brakeley Search to be presented for consideration
- An initial 30-45 minute interview with the Operations Director
- A 75 minute video interview with the members of the Maxwell/Hanrahan hiring team
- An in-person interview day with 2-3 sessions with the Maxwell/Hanrahan staff team

Throughout the process, we will make sure there is sufficient time for you to ask your questions. Interviews can be scheduled outside of normal business hours, if needed. With your permission, we ask final candidates to provide references. Employment is contingent on a satisfactory



background check. Pursuant to the San Francisco Fair Chance Ordinance, we will consider qualified applicants with arrest and conviction records. We are committed to keeping you informed of your status throughout the process and all candidates will be notified when the search has closed.

A detailed job description will be provided to candidates prior to phone interview with Brakeley Search.

Inquiries may be made in confidence to Scott Staub, Managing Director at SStaub@BrakeleySearch.com.

EOE STATEMENT

The Maxwell/Hanrahan Foundation is an Equal Opportunity Employer and is committed to creating a workplace that celebrates and reflects the diversity of our grantees and our community. Applicants who contribute to this diversity are strongly encouraged to apply.

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