



Invest in Others

Executive Director

**VETTED
SOLUTIONS**
A PASSION
FOR PURPOSE

SUMMARY OF POSITION

The Executive Director provides leadership and direction in fulfilling and advancing the mission of the Invest in Others Charitable Foundation. The ED is responsible for leading the Foundation in the achievement of its operational, strategic and fundraising goals including the success of the Foundation's fund and donor development, sponsorships and events, fiscal management, grants and program operations, board relations, human resource management, community relations, and administrative matters. The ED reports to the Invest in Others Charitable Foundation Board of Directors and has strategic and overall operational responsibility for the Foundation's financial affairs, staff, programs, events and execution of its mission and business plan. She/he will ensure that the Invest in Others Charitable Foundation's fiscal, operational, fundraising, marketing and communications, human resources, and program/events strategies are effectively implemented across all segments of the organization.

MISSION

The Invest in Others Charitable Foundation is a 501c3 organization whose mission is to help amplify the charitable work of financial advisors, employees and their firms, and support nonprofits that help improve lives in communities around the world. The Invest in Others Charitable Foundation serves as a catalyst to focus philanthropy and volunteerism to where it can have the greatest social impact.

The Invest in Others Charitable Foundation was founded in 2006 by talented and successful financial advisors from across the financial services industry to serve as a force multiplier to nonprofit organizations and causes that their firms support financially with the intent on having a profound impact on the lives of individuals and their communities.

STRATEGIC & PROGRAMMATIC LEADERSHIP

- In collaboration with the Board of Directors, the staff, and other key stakeholders, the ED develops and executes the Foundation's strategic plan.
- Ensures that people within the financial services and fund management community recognize the Foundation as the pre-eminent charitable entity within the profession, supporting the causes and nonprofits that members of the financial services industry support.
- Provides strategic and operational leadership while working closely with Board of Directors in the governance of the Foundation and in keeping them informed and engaged.
- Ensures the development, implementation, and execution of a long-range strategic plan that achieves the Foundation's mission via forward movement and growth with consistent and timely progress.
- Maintains effective relationships with a variety of external organizations including but not limited to the financial services community, financial planners, investment firms, governmental agencies, corporations, financial planner organizations and associations, and other associations and organizations/nonprofits that are aligned with the Foundation's goals and objectives.
- Takes a leadership role in identifying opportunities for collaboration across the financial services profession to advance the Foundation's brand, reputation and mission.

REVENUE GENERATION, FUNDRAISING AND MANAGEMENT

- Ensures a sustainable asset base by building long-term relationships with key donors and sponsors based on mission, cultivation, stewardship, and sound fiscal management.
- Serves as the Executive Producer of the annual IiO Awards Gala fundraising dinner and develops a strategy for establishing recognition events on a broader scale.

- Develops and expands fund raising capabilities to increase Invest In Others' ability to make meaningful grant awards and to enable the organization to effectively scale operations to meet future goals.
- Ensures the Foundation's financial stability and sustainability by maintaining healthy cash flow, successful investment oversight and optimal performance against budget.
- Promotes a culture of innovation with appropriate financial risk-taking commensurate with the Foundation's financial position.
- Plays an active role in soliciting philanthropic donations from local and national corporations, foundations and high-net worth individuals by building ongoing relationships, overseeing the crafting of the case for financial support and presenting the appeal.
- Ensures the Foundation is meeting budget and is able to deliver on its mission, including the necessary financial discipline and the investment in resources needed to achieve its goals.
- Oversees the preparation and management of the annual budget including expense management.

BOARD RELATIONS

- Develops and maintains positive and effective relations with the Board Chair, Executive Committee, and all other members of the Board of Directors.
- Ensures that the Board of Directors is kept fully informed of the opportunities, challenges and operations of the Foundation at all times.
- Serves as lead liaison between the Board and the staff.
- Cultivates partnerships with the Board of Directors and leads Board development activities. Assists in the recruitment of new board members.
- Oversees the preparation and distribution of Board/Committee materials. Serves as ex officio on all Board committees and works with the Executive Committee and Board leadership to implement Board decisions.
- Manages Governance, Finance & Audit, Investment & Governance committees and supports Programs & Events, Marketing & Development committees.

PUBLIC RELATIONS AND MARKETING

- Provides executive leadership on all public relations messaging and marketing efforts and serves as the public face and spokesperson for the important work of the Foundation.
- Leads the Foundation in public, private and governmental relations.
- Serves as a public "ambassador" for the Foundation.
- Establishes sound working relationships and cooperative arrangements with the Foundation's wide range of stakeholders and other organizations focused on the financial services and planning profession.

HUMAN RESOURCE MANAGEMENT

- Successfully manages staff in a remote work environment.
- Directly supervises, mentors, recruits, onboards, and builds a highly effective team to support and manage daily operations in accordance with the mission, objectives, established procedures and applicable laws and regulations.
- Cultivates an environment of diversity and inclusion throughout all facets of the Foundation.
- Fosters a culture that encourages full contribution, engagement and development of staff.
- Maintains a climate that attracts, motivates and retains a diverse staff of top-quality employees.
- Ensures that employee manual is enforced and remains in compliance with all applicable state and federal laws and Foundation policies.

COMMUNITY RELATIONS

- Promotes the Foundation's visibility through participation and membership in community forums, civic organizations, and activities that align with the Foundation's mission and vision.
- Serves as the Foundation's representative to the public, and provides education and assistance to others in understanding the Foundation's interests, mission, and concerns.

ADMINISTRATIVE MANAGEMENT

- Leads and oversees the administrative components of the Foundation including contracts and outside consultants. Works with the Foundation's legal counsel to ensure legal and regulatory compliance in all aspects of the Foundation's operations including State registrations.
- In conjunction with the Board's Governance Committee, designs, reviews, maintains, and implements all operational policies and guidelines for the Foundation and presents these to the Board of Directors for input and approval.
- Maintains current skills and knowledge of best practices within the field of philanthropy, attends seminars and professional training institutes as appropriate.

EDUCATION REQUIRED

- Bachelor's degree is required and a minimum of 10 years of senior-level management and fundraising experience, preferably in nonprofit organizations

PROFESSIONAL EXPERIENCE REQUIRED

The successful candidate should ideally possess a majority of the following core qualifications and professional experiences:

- An experienced visionary who has the ability to craft and implement new and effective approaches to revenue generation that can significantly propel an organization's growth to new levels.
- A proven record of scaling nonprofit organizations, developing effective fundraising, and implementing marketing and branding strategies.
- An individual who has experience in leading and growing multi-million dollar contributed revenue streams for nonprofit organizations.
- First-hand knowledge of and/or a proven track record working with the financial planning profession and an understanding of that community a plus.
- Senior leadership experience in nonprofit, association, government or private-sector management, which includes financial and administrative oversight responsibility.
- Experience working with, and supporting, a volunteer Board of Directors while helping them to prioritize objectives in terms of mission attainment and resource allocation.
- A proven track record in achieving strategic priorities through collaboration both inside and outside of the organization.
- An individual with a successful track record in leading an organization in change management.
- A proven track record of building, managing and leading effective teams with the ability to attract, retain, grow and inspire an impactful staff.
- A proven business acumen as one that recognizes finite financial resources and can prioritize allocation among many worthy programs and organizational efforts via clear operating metrics.
- A proven track record of local and national fundraising success.

- A proven track record of managing and implementing successful fundraising events, galas, golf tournaments, and implementing successful sponsorships.
- A highly motivated self-starter, with a strong and dynamic personality.
- A leader who is detail oriented, organized and administratively adept and has the ability to handle a large number of executives who serve as volunteer Board members.

KNOWLEDGE AND SKILLS

- A demonstrated knowledge of and passion for the work of public charities and community philanthropy.
- Demonstrated leadership and success in fundraising through the cultivation of donors.
- Ability to serve as the public face of the organization to the community.
- Knowledge of effective nonprofit governance practices and first-hand experience with nonprofit organizations.
- Demonstrated knowledge of investing, asset allocation, and fund accounting.
- Strong analytic, writing, and oral presentation skills, and creative problem solving.
- Experience hiring, leading, and delegating to staff as a cohesive and competent team of professionals.
- Project management skills that demonstrate an ability to set and meet deadlines.
- Ability to maintain strict confidentiality.

DIRECT REPORTS

- Vice President, Programs & Operations
- Director of Marketing
- Director of Sponsor Engagement

MEASURES OF SUCCESS

The specifics regarding measures of success, including metrics, will ultimately be agreed upon by the new ED and the IiO Board, but at the end of the executive's first year, the Board would expect the following:

- Partner with the Board in strategic planning that expands the organization's impact.
- Increase fundraising and sponsorship revenue.
- Raise the visibility of the Foundation to attract new donors and other stakeholders.

WEB PRESENCE

Web **www.investonothers.org**

Twitter **[@investonothers](https://twitter.com/investonothers)**

LinkedIn **[/invest-in-others-charitable-foundation](https://www.linkedin.com/company/invest-in-others-charitable-foundation)**

Vetted Solutions is a Washington, D.C. based executive search firm specializing in association and nonprofit recruiting and consulting. We focus on CEO and senior staff positions.

For confidential consideration, please email your resume and cover letter to:
liOEDsearch@vettedolutions.com or call +1 202 544 4749.

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