

MARTHA MONTAG BROWN  
& ASSOCIATES, LLC

*consultants in executive search  
placing leaders with a purpose*



**DIRECTOR OF PROGRAM OPERATIONS  
THE CALIFORNIA WELLNESS FOUNDATION**

*November 18, 2019*

**Overview**

The California Wellness Foundation seeks an innovative operational leader with excellent strategic, tactical and management skills and prior experience working in a strategic philanthropic setting for its newly created Director of Program Operations role. The Director will be the hub of the foundation's program team operations, playing a critical cross-functional role applying innovative operational management practices that create efficient program activities and effective grantmaking. The Director will serve as a member of the senior management Programs team and be a key partner and support to the Vice President of Programs managing all aspects of program and grantmaking operations. This position reports to the VP of Programs and can be based at either foundation headquarters in downtown Los Angeles or in the foundation's Oakland office.

**The Foundation**

The California Wellness Foundation is a private, independent foundation established in 1992 with a mission to protect and improve the health and wellness of the people of California. As one of the largest health-focused foundations in California, with over \$900 million in assets, Cal Wellness is a nationally recognized leader for its strategic core operating support for grantees; public policy grantmaking; and a focus on violence as a public health issue. It is Cal Wellness' desire to promote equity and level the playing field so that everyone has access to good-paying jobs, healthy and safe neighborhoods, and quality health care services. The Foundation's current Advancing Wellness grantmaking strategy includes four interrelated portfolios that focus on equitable access to health care; safe and healthy neighborhoods; economic security; and community and organizational leadership. Since its founding, Cal Wellness has awarded nearly 9,000 grants totaling more than \$1 billion. As the Foundation looks to the future, it is pursuing new and innovative strategies beyond its core grantmaking to advance its mission, including implementation of new technology systems, development of its public affairs capacity, and establishing mission- and program-related investment portfolios. Cal Wellness has a diverse staff of approximately 40 located in our Los Angeles and Oakland offices and a diverse 11-member Board located throughout the state of California. The Foundation's work underscores a belief that wellness requires social justice, a deep commitment to diversity, equity and inclusion (DEI), and sustained efforts to eliminate systemic barriers that prevent access to health care, education, employment and safety.

Please visit <http://www.calwellness.org> for more information.

## **Key Responsibilities**

- Program Operations Leadership. Develop, oversee and continually enhance the operational infrastructure, systems, and processes that ensure effective and efficient grantmaking operations. Manage systems to track distributions and develop projections to inform decision making and strategy development. Support organizational-wide goals that model the values-based culture, content, and philanthropic expertise Cal Wellness represents to employees and grantees.
- Operational Systems, Policies, Practices and Innovation. Play a critical cross-functional role to apply innovative operational management practices that create efficient program activities and effective grantmaking. Create tools and workflows that enhance the work and effectiveness of the Programs staff and the foundation's grantees. Demonstrate knowledge of grants processes and related financial and compliance matters and an understanding of online systems that support grantmaking workflows. Develop and maintain a robust program operations policies and procedures manual.
- Support to Vice President of Programs. Serve as a member of the Programs senior management team and support the Vice President of Programs with annual strategic planning, budgeting, grant allocation pipeline management, contract management for outside consultants, key performance metric analysis and tracking, staff management and development, and all other operational aspects of the department. Participate in strategy discussions and decision making that impact the Programs department and grantmaking, providing crucial perspectives on the operational implications of decisions, and promoting a culture of accountability and consistency. Serve as a creative and dependable problem solver and thought partner to the Vice President of Programs.
- Grantmaking Alignment, Communications and Coordination. Provide coordination, tracking, and regular communication for grant makers to ensure that pipeline and grantmaking processes fulfill requirements. Partner with Grants Management to provide coordination, tracking, and regular communication for program leaders to ensure that pipeline and grantmaking processes fulfill annual distribution requirements. Work closely with the President & CEO, Board of Directors, Grants Management, Finance, Operations and Public Affairs teams to support shared learning and to strengthen strategic and operational alignment across the foundation. Serve as a key liaison for the Programs department to other departments to help build effective, supportive and efficient working relationships.
- Compliance. Responsible for developing systems to track distributions and inform decision making regarding strategy and grantmaking, and for ensuring that all operations within the Programs department are compliant with the foundation's policies and practices and align with Cal Wellness' mission. Ensure that all program operations are in strong alignment with the foundation's mission, goals, policies and practices.

- Staff Management. Manage Program Coordinators. Effectively balance workload and assignments across the support team (Coordinators, and Administrative Assistant); provide coaching, feedback, and support the professional development of individual team members. Work closely with Program Directors and Program Officers to support effective and thoughtful working relationships with the program support team. Provide effective leadership for staff, including training, assigning and directing work, and appraising performance. Work with staff across the foundation to create a culture of learning and collaboration. Seek out and coordinate new learning opportunities for Programs staff, including internal trainings and external convenings and conferences. Embody effective and respectful teamwork in keeping with Cal Wellness values.
- External Engagement. Serve as an ambassador, participant and presenter at a range of external meetings and convenings related to Program and Foundation goals and policies.
- Special Projects. Manage special projects, program related investments, and serve as a backup to Program Directors as needed.

## QUALIFICATIONS

While no one candidate will embody all the qualifications enumerated below, the ideal candidate will possess many of the following professional and personal abilities, attributes, and experiences:

- Minimum of 7 years of experience in a mid-to-high level program operations management role, preferably in strategic philanthropic grantmaking setting.
- Experience in team management or supervising an administrative team.
- Deep knowledge of the field and best practices in philanthropy and strategic grantmaking.
- Experience working across the social sector with foundations, non-profits, and mission-driven organizations.
- Demonstrated knowledge of grants processes and related financial and compliance matters.
- An understanding of online systems that support grantmaking workflows.
- Exceptional written and verbal communications skills and ability to convey complex information and data visually and orally in a concise, effective, and engaging way.
- An effective manager with demonstrated ability to develop strengths of individual team members and to build effective, values-based teams.
- A dynamic influencer with highly effective interpersonal and relational skills, including a demonstrated ability to work successfully across teams and with roles at multiple levels.
- Proven ability to build collaborative relationships, operate in a team environment.
- Ability to evaluate risks and opportunities, using analytical and strong problem-solving skills.
- Professional demeanor that demonstrates warmth, dependability, responsiveness, knowledge and credibility.
- Handles deadlines and pressure with poise; and responds with grace and flexibility in a rapidly changing environment.

- Effective time management skills with demonstrated ability to balance multiple priorities and tasks simultaneously and manage a diverse and demanding workload in a fast-paced environment.
- A sense of humor that contributes to team spirit.

### Compensation and Culture

Salary is competitive and commensurate with background and experience. The salary range for the position is \$126,700 - \$190,100. The benefits package includes a variety of health plans, a generous 401(k) retirement savings plan, paid time off, professional development and educational opportunities, matching gifts, and the opportunity to work at a mission- and values-driven organization.

### To Apply

[Martha Montag Brown & Associates, LLC](#) has been retained for this search. Interested and qualified candidates should apply by sending a cover letter, resume and salary requirements by email to [Martha@marthamontagbrown.com](mailto:Martha@marthamontagbrown.com). All correspondence will remain confidential.

The California Wellness Foundation is an equal opportunity employer.

*The above job description is intended to describe the general nature and level of work performed and is not intended to limit the scope of potential work assignments. This is only a summary of the typical functions of the job and duties may differ from those as outlined above.*