



**GRANTS MANAGEMENT VICE PRESIDENT
INTEGRATED PHILANTHROPY PRACTICE – CLIENT SERVICES
FREMONT GROUP
San Francisco, CA
*December 22, 2023 (Updated)***

THE OPPORTUNITY

Fremont Group, the San Francisco-based private investment office for the Bechtel family, seeks an innovative and entrepreneurial grants management and operations leader to serve in the newly created Grants Management Vice President position. This role is a key position within the firm's Integrated Philanthropy Practice, a function embedded within Client Services. The Integrated Philanthropy Practice is responsible for managing 17 client foundations, providing professional advice to support the clients' philanthropic vision, and helping increase the impact of their personal and institutional giving.

This position offers a dynamic opportunity to engage in all aspects of Fremont's client philanthropy and help shape the next phase of service delivery within the Integrated Philanthropy Practice. The Grants Management Vice President is responsible for all functional areas of grants management, focusing on accuracy, timeliness, consistency, and optimal user experience. They will design, operationalize, and streamline processes that support the evolving needs of clients' philanthropy and ensure adherence of grants to appropriate policies and procedures. Serving as a trusted partner, they will build and maintain relationships with Fremont clients and colleagues to advance learning and best practices in effective grantmaking. They will also be hands-on and conduct baseline due diligence and system activities across select grant portfolios.

The ideal candidate is an agile, experienced leader with proven experience in executing grants management strategy, designing and improving grants management systems and processes, implementing effective grantmaking practices, operationalizing key policies, and leading teams or organizations through change toward greater cohesion. They will bring 5+ years of grants management experience in relevant philanthropic settings, including private foundations, family foundations, family offices, or other grantmaking entities of comparable complexity.

This position reports to the Director, Integrated Philanthropy Practice. This is a full-time, exempt hybrid position with an in-office schedule (Tuesday -Thursday) working from the Fremont Group's offices in downtown San Francisco.

FREMONT GROUP

Who We Are. Fremont Group is the San Francisco-based private investment office for the Bechtel family. In addition to its role as an investment manager, Fremont serves as a full-service Family Office with over one hundred and fifty employees. Fremont Group's success as an investor has been based upon the values of integrity, teamwork, innovation, and sound judgment. Fremont has assets under management across a broad array of asset classes, investing in funds of funds directly, and has a unique and long-term focus in its investment program. Our investment strategy is to identify opportunities with the potential for superior returns, with a focus on investing for the long term. Fremont invests directly through teams of professionals it sponsors as well as through other external managers. Fremont considers itself a "business investor" due to its operating orientation and its commitment to partnership with its managers and portfolio companies to create value over the medium to long term.

Culture of Learning, Inclusion and Impact. Fremont fosters a welcoming and inclusive culture that values each individual's unique ideas, perspectives, and backgrounds. We invest in the ongoing education of our people and are committed to making Fremont a diverse, equitable, and inclusive place to work. We feel that all our employees have ideas worth hearing, and we have created a collaborative and collegial environment in which we are empowered to do our best work. We believe that our firm is only as good as its people. This is why we invest heavily in our employees' ongoing education, career development, and holistic well-being. Mentorship is one of Fremont's core values, and we take the development and growth of our people seriously. Employees at all levels and functions receive support to help them grow their technical, business, and leadership expertise relative to their functional area. All employees can make a visible impact on the firm, be recognized, and grow their careers in meaningful ways.

Social Impact and Philanthropy. Social impact and philanthropy are at the core of what we do and who we are as community members. Fremont encourages and celebrates the contributions of employees in the community. Through the Fremont Group Foundation (FGF), we offer various ways for employees to make an impact, including employee-organized volunteer events, an annual fundraiser, and Annual Giving Month. We also offer generous volunteer time off, donation matching, and service awards for employees who volunteer and/or serve on the governing board of an eligible organization.

INTEGRATED PHILANTHROPY PRACTICE

The Integrated Philanthropy Practice manages 17 client foundations, provides professional advice, supports the clients' philanthropic vision, and helps them increase the impact of their personal and institutional giving. Fremont clients are philanthropy learners and leaders whose vision and path to achieving success take shape in different ways. The success of the Integrated Philanthropy Practice relies heavily on a consultative, collaborative approach, meeting high standards and driving innovation and excellence. The Integrated Philanthropy Practice is led by the Director, Integrated Philanthropy Practice. The team also includes a Philanthropy Vice President, Grants Management Vice President, and contracted subject matter experts, advisors,

and nonprofit attorneys.

The Integrated Philanthropy Practice is embedded within the Client Services function, a team of 18 who provide a range of services to family clients, including estate planning, human resources, financial services, tax planning, philanthropic advice and management, and more. Most team members have experience and expertise in law, estate planning, and wealth management. The team is collaborative and driven to provide exceptional client services by executing daily projects and transactions while providing insights and advice to meet client needs and interests. Excellent communication, attention to detail, accuracy, and service delivery drive everything accomplished within the Client Services team.

KEY RESPONSIBILITIES

As our clients' grantmaking portfolios grow and evolve, the Grants Management Vice President will lead the implementation of systems, processes, and procedures that foster partnership, efficiency, and increased effectiveness in our service delivery. Key responsibilities include:

Grants Management, Operations, Policies, and Processes

- Manage the efficient flow of grants through the entire life cycle, ensuring positive grantee and staff experience, policy adherence, and timely and accurate processing.
- Develop and maintain grantmaking policies, templates, and tools to support clients' philanthropy.
- Evaluate and enhance workflow processes. Communicate with key stakeholders to gather information, analyze, present recommendations, and lead workflow changes. Develop or update process documentation and instructions.
- Monitor operations and process performance by collecting and assessing qualitative and quantitative metrics. Build feedback mechanisms to ensure early detection of issues and adjust grants management service, training, and communications.
- Support the establishment of a sophisticated culture of grants management and effective philanthropic practices for all Fremont clients.
- Provide guidance on legal due diligence and compliance review procedures to ensure adherence to IRS requirements and grants management best practices. Partner with Legal to assess potential risks and identify, develop, and implement institutional compliance policies and procedures.
- Partner with Director, Integrated Philanthropy Practice to advise on grantmaking strategies and portfolios with a big-picture approach while working on individual grants through the complete lifecycle.

Grants Processing

- Accurately and expeditiously process grants approved by clients, including creating organization and contact records, conducting baseline due diligence, coordinating grant payments, ensuring complete grant files, drafting grant letters and agreements, reviewing

grantee reports, completing grant close-out, and other responsibilities.

- Review grantee materials and supporting documents for compliance with IRS rules for private foundations and adherence to internal policies.

Data, Systems, and Learning

- Provide functional leadership in the design of systems for collecting, classifying, and storing grants data. Develop standards and tools to ensure data accuracy and usage.
- Identify, translate, and present trends and potential issues based on data analysis to appropriate audiences to promote learning, planning, and transparency.
- Stay abreast of new developments in grantmaking systems and their applicability to the evolving needs of the Foundations. Partner with the Business Technology Team on the evaluation and implementation efforts to improve existing technologies and develop new solutions.
- Develop and provide ongoing training to Client Services staff on philanthropy best practices, grantmaking policies, processes, due diligence, and the grantmaking system.

Collaboration and Sector Engagement

- Build trust, rapport, and shared understanding across a variety of stakeholders and drive alignment across Client Services to support clients' philanthropic vision and goals.
- Advise, lead, and support grantmaking efforts with presence and confidence to facilitate conversations, advocate a point of view, and incorporate multiple perspectives.
- Cultivate relationships and touchpoints across the enterprise, including tax, accounting, and legal advisors, to ensure grantmaking activities, operational goals, and overall strategic priorities are integrated, aligned, and on track.
- Coordinate with colleagues to manage grantee, client, and client representative communication.
- Engage with philanthropic communities and peers to stay current on philanthropy trends and practices to translate the learning and inform grantmaking practices at Fremont.

KEY QUALIFICATIONS

The ideal candidate has expertise and direct experience working with the nuances and complexities of grantmaking operations across a wide range of charitable vehicles and with a diverse array of grantees and partners. Candidates must be knowledgeable regarding current and evolving grants management practices and perspectives within the philanthropic sector. Additional qualifications include the following:

- A minimum of five years of grants management experience, with a preference for private foundation grantmaking experience and deep knowledge of legal requirements and compliance rules for private foundation grantmaking to domestic and international organizations.
- A self-starter passionate about grants management who has demonstrated ways to solve problems through creative thinking, leveraging resources, and proactively seizing

opportunities to increase efficiency and impact.

- Strong knowledge of Salesforce, FoundationConnect, or other grants management systems is required, with a track record for improving and enhancing existing technologies and developing new solutions.
- Demonstrated leadership skills and ability to build strong, collaborative partnerships that foster mutual trust and respect across all levels of the foundation.
- Excellent written, verbal, and analytical skills.
- A dynamic influencer with highly effective interpersonal and relational skills, including a demonstrated ability to build strong, collaborative partnerships that foster mutual trust and respect across all levels of the organization.
- Able to work productively in fast-paced settings and make decisions with great attention to detail and deadlines.
- Demonstrated ability to develop and implement complex projects, set realistic goals and objectives, and balance multiple priorities.
- BA/BS degree or equivalent work experience; relevant advanced degree preferred.

COMPENSATION & BENEFITS

This is a full-time, exempt position. Fremont offers highly competitive compensation packages commensurate with related work experience and education. The compensation range for this position is \$175,000 to \$225,000, plus an annual discretionary bonus.

Fremont also offers excellent benefits for eligible employees available on the date of hire. Current benefits include but are not limited to medical (PPO, HMO, and HDHPs); dental and vision coverage; 401(k) with 5% employer match plus an annual employer contribution; life insurance; disability insurance; HSA contribution when enrolled in HDHP; Flexible Savings Account (FSA); dependent care account; transit/parking assistance; flexible time off/vacation (no caps); paid medical leave; 20 weeks of paid parental leave; a generous child care stipend for qualified families; infertility benefit; an employee assistance program (EAP) including access to financial advice, mental health services, and health advocacy services, and ongoing education assistance. In support of our organization's core values, Fremont offers paid time off to volunteer for nonprofit organizations and direct grants and matching grants for employee contributions to tax-exempt organizations. Fremont Group is an Equal Opportunity Employer

COVID-19

At Fremont, the health and safety of our people is a top priority. That is why all offers of employment, where legally permitted, are contingent on the candidate being either (i) fully vaccinated and boosted against COVID-19 or (ii) having received the COVID-19 bivalent-updated vaccine to pass the pre-employment requirements. Individuals with medical issues or sincerely held religious beliefs or practices that prevent them from getting the vaccine may request an accommodation to this requirement.

TO APPLY

Martha Montag Brown & Associates, LLC has been retained for this search. Interested and qualified candidates should apply by emailing a cover letter and resume to search@marthamontagbrown.com. All correspondence will remain confidential.