GRANTS MANAGEMENT VICE PRESIDENT
INTEGRATED PHILANTHROPY PRACTICE – CLIENT SERVICES
FREMONT GROUP
San Francisco, CA
December 12, 2023

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 on personal donations and institutional giving, and building a grants management program based upon best practices in the sector.

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. In Client Services, you will be part of a group that will invest in your professional development. We are a closely-knit team that believes in taking the time to train and coach so that you can continue to grow. This role allows you to hone your technical skills, build long-term relationships, and grow as a sector leader.

The Grants Management Vice President will 1) serve as a resident expert in grants management and philanthropic practices while leading with a collaborative, client service mindset; 2) drive operational efficiencies throughout the entirety of the grant life cycle and grantmaking practice; 3) encourage and inspire best-in-class grantmaking approaches; 4) build and maintain relationships with Fremont clients and colleagues; and 5) advise on how to leverage the team’s collective knowledge, skills and best practices in the sector to benefit the philanthropic services Fremont provides to its clients’ personal and foundation grantmaking portfolios.

The ideal candidate will be a grants management and operations leader with substantial experience working in private philanthropy, a family office, or other grantmaking institutions of comparable complexity. Candidates must have a passion for client services and customer service and outstanding written, verbal, analytical, and project management skills. Advanced computer proficiency is required, particularly in Salesforce database grants management and workflow, MS Office suite, and other project tracking platforms.
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. As a relatively smaller organization, 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 (VTO), 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 on personal donations and institutional giving, and is building a grants management program based upon best practices in the sector. 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 in various ways. The Integrated Philanthropy Practice is led by the Director of Philanthropy. 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 implementing 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, new efficiencies, and being more effective in our service delivery. The Grants Management Vice President will provide a balance of tailored and consistent services and expert advice. Key responsibilities include:

**Grants Management and Grantmaking Practice**

- Manage grants through the entire lifecycle, including creating, maintaining, and updating grants tracking systems.
- Support the establishment of a sophisticated culture of grants management and effective philanthropic practices for all Fremont clients.
- Provide expert advice for individual grants and to grantees on matters such as charitable purpose, effective due diligence, expenditure responsibility, assessment of grantee organizational capacity and health, grant and portfolio structuring, monitoring, and measuring impact.
- Advise on grantmaking strategies, portfolios, and goals with a big-picture approach while working on individual grants from inception through the complete lifecycle. Ensure alignment between the set-up of individual grants and overall operational and charitable goals.
- Proactively identify and propose workflow improvements, leading the iteration and refinement of critical operating structures and processes for grantmaking including Grant Agreement templates and other crucial documentation.
● Serve as a key contributor to the ongoing development and implementation of the Salesforce system to support the grantmaking process.

Grants Processing
● Coordinate with colleagues to manage grantee, client, and client representative communication.
● Process grants approved by clients, including conducting due diligence, coordinating with accounting for grant payment, ensuring a complete grant file via data entry and document upload, reviewing grantee reports, completing grant close-out, and other grant processing tasks and responsibilities.
● Manage the compliance and regulatory aspects of grantmaking with 501(c)3 private foundations, public charities, 501(c)4 social welfare organizations, and other nonprofit entities.

Consulting and Collaboration
● Build trust, rapport, and respect with each client and colleague working on specific and broad charitable approaches. Act as an operational and advisory partner to support activities and goals for grantmaking.
● 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 with colleagues from 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.

Data/Insights/Learning
● Develop frameworks for data collection and share data-driven insights. Consider uses of data for knowledge sharing, monitoring, forecasting, planning, and other learning and operational needs.
● Share knowledge and create resources and tools. This includes taking an analytical and problem-solving approach to improve how Fremont clients collect, curate, and use knowledge and information about grants and grantees.
● Create and deliver Client Services staff onboarding sessions and trainings on philanthropy best practices and grants management.
● Collect and encourage feedback from Fremont clients to identify and respond to training needs and opportunities.

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 well-read, interested, and
knowledgeable regarding current and evolving grants management practices and perspectives within the philanthropic sector. Additional qualifications include:

- At least five years of demonstrated grants management experience, preferably leading operations/data/systems work with a private foundation or other grantmaking institution of comparable complexity.
- Deep knowledge of the field and best practices in operations-related issues in philanthropy and strategic grantmaking.
- 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.
- Advanced computer proficiency is required, particularly in Salesforce database grants management and workflow, MS Office suite, and other project tracking platforms.
- Excellent written, verbal, and analytical skills.
- 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.
- Strong organizational skills with attention to detail and the ability to take initiative, multi-task, and prioritize work.
- Good judgment and ability to work independently.
- Demonstrated project management expertise.
- BA/BS degree; 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, resume, and salary requirements to search@marthamontagbrown.com. All correspondence will remain confidential.