

MARTHA MONTAG BROWN
& ASSOCIATES, LLC

*consultants in executive search
placing leaders with a purpose*



POSITION DESCRIPTION
PROGRAM OFFICER – EDUCATION
CHARLES & HELEN SCHWAB FOUNDATION
San Francisco, CA or Remote – September 20, 2023

ABOUT THE CHARLES AND HELEN SCHWAB FOUNDATION

The Charles and Helen Schwab Foundation (CHSF) envisions a world in which all people lead fulfilling and choice-filled lives. CHSF funds solutions in education, housing, and employment that increase economic power and wellbeing in historically marginalized communities. We prioritize innovative approaches that advance racial equity and remove systemic barriers that perpetuate generational cycles of poverty. In March 2023, the Foundation’s board of trustees approved a new strategic plan that focuses on public education nationally, and housing and homelessness in the Bay Area. We are eager to add to our team at this exciting juncture in the Foundation’s history as we begin to implement our new strategy.

Public Education

Our education work is anchored in the belief that all families, especially those from historically marginalized communities, should have the power to choose from a diverse set of schools that meet their children’s academic and emotional needs. We focus on the creation and growth of public charter schools that are driving significant learning gains for low-income children of color. To complement our schools work, we fund human capital programs, advocacy efforts of parent-led and community-based organizations, and innovations in school design and the future of learning. We also focus on ensuring students have the preparation and agency to pursue pathways of their choosing to post-secondary success by supporting better, faster, cheaper, and more equitable routes to a degree and/or professional credentials and certifications.

Housing and Homelessness

Our housing and homelessness work is anchored in the belief that housing is a fundamental human right. All Bay Area residents, especially those from historically marginalized communities, should have the opportunity and agency to choose safe, affordable, and secure housing. We focus on increasing the supply of high-quality temporary housing options, and support complementary efforts targeting job training, case manager support, and improved flow into and out of temporary housing. We also focus on prevention efforts and expanded pathways to employment and stable careers for extremely low-income populations.

Our Grantmaking Approach

We center our grantmaking on two core principles.

Racial equity: While we organize our work around two distinct program areas, we view racial inequities in our public schools and in our housing policies as inextricably intertwined. We prioritize racial equity in our grantmaking to address historically rooted and ongoing disparities in educational access and outcomes, economic mobility, and stable and affordable housing. We intentionally invest in solutions that seek to redress these disparities and in organizations led and informed by people of color who are most proximate to the work and have the most at stake in change and progress.

Doubling down and breaking new ground: We are committed to investing in what we know works. We support proven models that aspire to grow and increase their impact. At the same time, we know that without new approaches we will continue to see the same results. So we also seek opportunities to be founding or early supporters of innovative efforts to reimagine existing solutions and seed or scale new ones.

Who We Are and What We Believe

We are a small, dynamic team with diverse experiences and perspectives. We are former public school teachers, school leaders, school systems administrators, public health researchers, policy and advocacy practitioners, environmental advocates, and long-time philanthropy leaders. We are motivated by working to break the correlation between zip codes and positive life outcomes.

We believe that:

- The problems we are trying to address are complex but fundamentally solvable.
- Our work first and foremost is in service of and in partnership with our grantees and the individuals, families, and communities they serve.
- Doing good is great but making lasting change is better.

How we operate:

- We are professional but non-hierarchical and informal. We take the work but not ourselves seriously.
- We approach our work with the passion, urgency, and resilience it demands.
- We work to be self-reflective and embrace a continuous improvement mindset as grantmakers and team members.
- We work to be empathetic, transparent, responsive, and humble as grantmakers and team members.
- Everyone's voice and experience matters. We work to build trust that enables us to know each other and our grantees as people and be vulnerable and authentic with one another.
- We work to ensure all members of the team have a fulfilling work experience and opportunities for personal and professional growth.
- We actively seek to collaborate with our funder peers to learn from their experiences and better leverage our collective impact.

POSITION OVERVIEW

Reporting to the Senior Program Officer, Education, the Program Officer, Education is a key member of our team with the opportunity to help shape the implementation and evolution of the Foundation's education strategy. You are a dynamic, highly knowledgeable professional who believes in the Foundation's mission and vision and is passionate about the power of public education to be an instrument of racial equity, economic mobility, and individual and community transformation. You will:

- Manage the day-to-day relationships with and progress of a set of the Foundation's grantees.
- Source and conduct due diligence on prospective new grantees, including making funding recommendations to the CHSF team and our trustees.
- Collaborate and build partnerships and coalitions with peer funders and other key stakeholders.
- Work with the CHSF team as a whole to ensure we are effectively supporting our grantees, maintaining alignment and fidelity to the Foundation's mission and strategy, and maximizing our impact.

KEY RESPONSIBILITIES

Grantmaking

- Identify organizations and initiatives that align with CHSF's strategic priorities using thorough research and evaluation rooted in equitable and trust-based philanthropy.
- Conduct due diligence on potential grantees, including reviewing grant proposals and proposed metrics, meeting with leadership teams, conducting site visits, and consulting with trusted partners.
- Write and present funding recommendations to the CHSF team and trustees.
- Cultivate and manage relationships with existing and potential grantees, acting as primary contact and thought partner.

Learning, Evaluation, and Strategic Refinement

- Conduct annual review of grantees in service of (1) program oversight, (2) identifying shared successes and challenges across the portfolio and leveraging those insights to support grantees in maximizing their impact, and (3) evaluating CHSF's strategy, practices, and impact.
- Help ensure CHSF's education program is as impactful and responsive as possible by proactively surfacing needs, insights, and trends across the education ecosystem that may impact grantmaking strategy and practice.

Partnerships & Relationship Management

- Build relationships with a broad network of partners working in common cause.
- Identify opportunities to maximize CHSF's impact by partnering with other funders on shared programmatic, policy or other systems change efforts.

QUALIFICATIONS

- Demonstrated commitment to education equity and racial justice.
- Five to ten+ years of professional experience in K-12 public education, in particular working directly with or in service of low-income students, families or communities.
- Comprehensive understanding of the factors affecting K-12 public education in the United States, with particular knowledge of and direct experience with the public charter school movement and related human capital and advocacy ecosystems. Experience with efforts to accelerate innovation in K-12 schools and improve post-secondary pathways for college and career success preferred.
- A strategic thinker who asks questions, makes connections across organizations and systems, anticipates roadblocks, and proactively identifies solutions.
- Experience with program evaluation and demonstrated ability to analyze and interpret data and measure outcomes and impact.
- Excellent written and verbal communication skills, including demonstrated ability to synthesize information, present it clearly and concisely, and make persuasive rationales for investments.
- Ability and orientation to adapt and be flexible in response to the changing needs of the organizations and communities we serve.
- Skilled at building authentic relationships, partnerships, and coalitions with diverse groups of people and organizations.
- Strong project management skills.
- Commitment to continuous learning, reflection and growth.
- Ability to work effectively on a small, entrepreneurial team, including comfort with both staff collaboration and self-direction.
- Familiarity and comfort with cloud-based collaborative tools.
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COMPENSATION AND BENEFITS

The target salary for this role is \$135,000 - \$165,000 based on experience. This is a full-time exempt position.

CHSF believes in work-life balance and ensuring that employees are able to care for themselves and their family members. Therefore, compensation at CHSF also includes an excellent comprehensive benefits package, including nearly 100% employer paid health insurance, fully paid coverage for dental and vision insurance, generous vacation and sick leave, plus additional organization-wide holidays, and a significant matching contribution from CHSF to a retirement plan for all eligible employees. To facilitate hybrid work, CHSF also reimburses employees for partial cell phone, partial home internet access, and partial commuting expenses.

LOCATION

We are conducting a national search for this position. Candidates based in the San Francisco Bay Area who are able to work on a hybrid schedule in our San Francisco office are preferred. However, we will also consider qualified remote candidates based elsewhere in the United States. Candidates must be eligible and authorized to work in the United States.

CHSF's office is located in San Francisco. Currently, we are operating in a hybrid work environment. While managers have some discretion over the schedule, team members who live in the Bay Area are generally expected to work in our office in person three days per week and may choose to work in the office or remotely two days per week. Please note that in a constantly changing environment, CHSF may adjust these expectations. The Program Officer will likely travel 10-20 days per year to conferences, funder meetings, site visits, etc.

EQUAL OPPORTUNITY / DIVERSITY STATEMENT

CHSF prohibits discrimination of employment, promotion, compensation, terms, conditions, or privileges of employment on the basis of race, color, ancestry, national origin, gender, sexual orientation, sex (including marital and parental status), religion, age, disability, actual or perceived gender identity or expression, weight, personal appearance, family responsibilities, genetic information, economic status, veteran's status, or any other basis prohibited by applicable law. CHSF is an equal opportunity employer and will comply with all applicable laws prohibiting discrimination in employment.

CHSF's equal opportunity policy covers all programs, services, policies, and procedures of CHSF, including opportunity for employment and treatment as a CHSF employee, as well as opportunities for vendors to contract with CHSF.

TO APPLY

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