

## **Associate Director, Partnerships**

Boston, MA preferred, but also open to candidates in Austin, TX; San Francisco, CA; or Washington, D.C. If not based in Boston, candidates would be encouraged to travel to Boston ~6 or more times per year for key meetings and annual team events; in addition, candidates may need to travel to other locations for key meetings, conferences or other events.

## **About Us**

Social Finance is a national impact finance and advisory nonprofit. By working with the public, private, and social sectors, we create partnerships and investments to measurably improve lives. In the past decade, we have mobilized over \$225 million to help more than 35,000 individuals realize improved outcomes in education, economic mobility, health, and housing.

We are driven by the belief that social and economic systems should enable all people to thrive, and the conviction that we can create the most meaningful and measurable change in our communities when governments and markets work together. Our organization is built upon four core values:

- Putting people first
- Focusing on results
- Demonstrating the highest standards of integrity and accountability
- Building enduring cross-sector partnerships

And it is strengthened by a commitment to [diversity, equity, and inclusion \(DEI\)](#).

We work across three core practice areas: Impact Investing, Impact Advisory, and Field Building. Through our Impact Investing portfolio, we develop and manage innovative investments, including the [Career Impact Bond](#) and the [Social Impact Bond](#). In our Impact Advisory practice, we work alongside impact-focused leaders to implement outcomes-oriented approaches. And in our Field Building work, we share firsthand learnings and best practices to catalyze social impact in the field. Across all our work,

which spans the public, private, and social sectors, we continually challenge ourselves and our partners to use funding and data in innovative ways to create lasting impact.

## **Role and Responsibilities**

Reporting to the Vice President, Partnerships & Strategy, the Associate Director (AD), Partnerships will support the development and maintenance of key relationships for core philanthropic support and in key strategic priority areas; manage relationship management processes; and support work for the Board of Directors Partnerships Committee. Primary responsibilities will include:

### **Implement Processes and Support Existing Relationships (40%)**

- Assess current network of Social Finance partnerships and processes; design, implement and manage ongoing processes to own and strengthen relationships with existing and potential partners, including family offices and foundations
- Help maintain relationships with current partners, including by supporting meeting preparation, setting agendas, and developing materials; where appropriate, interface directly with external partners by leading or attending calls and meetings
- Manage firm-wide partner outreach, where appropriate, including sourcing and designing content for monthly news “clips”
- In partnership with the VP, design and implement systems to set and report on regular (e.g. quarterly) goals
- Support organizational efforts to assess feasibility of current customer relationship management (CRM) system, make recommendations as to any new systems needed, and to establish best practices for using our CRM system to support ongoing relationship management
- Track all relevant relationship information in CRM

### **Explore and Pursue New Partnerships (40%)**

- In partnership with the VP, develop and execute vision for creating and expanding new partnerships with key constituencies, which may include conducting research into foundation and family office priorities, preparing materials and prepping for meetings, conducting follow-on communication as relevant with potential partners, and helping design new ways to partner with key constituents

- Conduct research on prospective partners for core philanthropic support and in key strategic priority areas (e.g. economic mobility or maternal & child health)
- Develop, review and refine materials such as concept notes, proposals, letters of inquiry, reports, and briefings, to unlock new or enhance existing support for priority initiatives (in collaboration with Grants Manager)
- Support design and implementation of events and other outreach activities for potential (and existing) partners, such as dinners, informational webinars, etc.
- Use learnings and feedback from the field to inform organizational strategy and communications about our work

#### **Support Board of Directors (10%)**

- Support the work of the Board of Directors Partnerships Committee (charged with supporting the organization's efforts to secure new partnerships and financial resources, including both grant and investment capital) by helping to coordinate and prepare for meetings, creating materials, and partnering with the Leadership Team and other staff members to curate the appropriate information; conduct desk research and analysis as needed

In addition to core responsibilities, the AD will support firm building efforts by contributing to capacity-building initiatives, such as recruiting, professional development, or other internal projects, and support internal functional and Social Finance project teams as needed.

### **Qualifications**

We are searching for candidates who enjoy collaborating with colleagues to learn, problem-solve, and achieve social impact at scale. Candidates must have:

- 5-7 years combined work experience in business development, client relationship management, fundraising, or other relevant field, ideally working with investors, foundations, and/or high net worth individuals
- Strong project management experience
- Excellent organizational skills and ability to prioritize tasks, balance multiple assignments, meet deadlines, and thrive in a complex environment with multiple and shifting priorities

- Strong verbal and written communication skills; ability to tailor communications and information for many different types of stakeholders
- Ability to quickly research, synthesize and summarize key takeaways on unfamiliar topics in both written and verbal form
- Thrives on creating structure in unstructured areas
- Is energized by meeting new people and building relationships
- Ability to work with a variety of internal and external stakeholders in a collegial, yet demanding work environment; ability to effectively run meetings to achieve goals
- Excellent interpersonal skills, especially with external stakeholders; ability to establish and maintain effective working relationships across multiple sectors, including with C-level executives
- Keen attention to detail, with the ability to deliver clear, concise materials with minimal to no errors, and plan meetings with every aspect considered and addressed
- Willingness to constructively express your point of view and hear the point of view of others, both internally and externally
- Ability to adapt and be flexible
- Commitment to enhancing a team culture of inclusion, belonging and equity
- The following are not required, but would be considered as a plus for your candidacy:
  - Experience in or with the systems we seek to impact
  - Advanced PowerPoint and Excel experience
  - Experience with events management
  - Experience working closely with or on a nonprofit Board of Directors
  - Experience within a nonprofit or mission-aligned organization

## **Benefits**

At Social Finance, we strive to deliver a benefits program that will enhance our overall value proposition to employees. Our current benefit offerings include:

- Comprehensive health care coverage: medical, dental and vision insurance; flexible spending accounts; Employee Healthy Actions programs and more
- Retirement savings plan with employer contribution
- Short-term, long-term and life insurance policies
- Commuter benefits and cell phone reimbursements

- Hybrid work model (in office three days per week, work from home two days per week and on an ad-hoc basis as needed)
- Dedicated budgets for team building and employee recognition
- Annual budget for external professional development opportunities
- Mentorship and onboarding programs
- Collaborative and energizing workspaces in downtown Boston, San Francisco and Austin
- Paid vacation and paid holidays (with 12/24-1/1 off every year)
- Paid parental leave
- A truly stellar team of high performing, values-driven and fun (!) professionals

## **Application**

Applicants must be permanently authorized to work in the United States on a full-time basis. Send cover letter and resume to [hire@socialfinance.org](mailto:hire@socialfinance.org) (Subject line: AD, Partnerships, [office preference]).

Review of applications will begin immediately. No phone calls please.

*Please note that, at this time, to be in-person at a Social Finance office, client location or Social Finance-sponsored event, you must be fully vaccinated against COVID-19.*

*Social Finance, Inc. is an equal opportunity employer, and all qualified applicants will be afforded equal employment opportunities without discrimination because of actual or perceived race, color, national origin, sex, age, religion, creed, disability, marital status, citizenship, ancestry, personal appearance, sexual orientation, gender identity or expression, political affiliation, military status, status as a protected veteran, genetic information or any other legally protected status.*