

Associate Director, Strategy

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 expected to travel to Boston ~6 or more times per year for quarterly Board of Directors meetings and annual team 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), Strategy will support organization-wide strategic planning and new business initiatives; help manage the work, meeting preparation and content for the Board of Directors and its sub-committees; and be responsible for ensuring an effective cross-functional team approach for communicating and sharing knowledge across project and internal teams via regular employee forums and centralized learning systems. Primary responsibilities will include:

Lead and Support Firm Strategy Planning (40%)

- Provide project management for the organization's annual strategy planning and goal setting processes, including quarterly progress touchpoints, by coordinating with internal product & project team leadership to collect, synthesize and communicate relevant information and by working closely with the VP and Senior Team to define strategic priorities
- Partner with VP to drive implementation of the strategic vision for the organization and provide support in the development of actionable and quantifiable plans to achieve desired results and overall intended impact
- Communicate strategy, targets, and initiatives to internal and external stakeholders. Lead development of content and materials to communicate strategy including, but not limited to, PowerPoint presentations, memos, etc.
- Lead design and execution of annual (internal) firm strategy day (usually held in late summer)
- Support and manage special projects related to firm strategy and new market areas as needed, which may include: scoping, planning and execution of strategic initiatives; ensuring a cross functional, collaborative approach; determining critical milestones and key performance indicators are met; and guiding internal parties to meet sequential targets and report progress

Support Board of Directors Engagement (40%)

- Work with the VP of Partnerships & Strategy, Board Chair, President & CEO and Executive Assistant to the CEO, to determine the annual agenda and schedules of the Board of Directors and standing committees
- Support the work of the Board of Directors and committees (standing committees, as well as ad hoc working groups as appropriate), as well as the Advisory Council
- Coordinate and prepare board meetings and materials, including for quarterly meetings, annual retreat, and quarterly or monthly updates; partner with the Leadership Team and other staff members to curate the appropriate information; conduct desk research and analysis as needed
- Partner with the VP and CEO to ensure support for the Board Governance & Nominating Committee, overseeing Board candidate pipeline development, new Board member onboarding, annual nominating and voting cycle, the annual board self-assessment; work with the Executive Assistant to the CEO to ensure completions of annual forms
- Attend all Board meetings; take excellent minutes to be affirmed by the Board at the following quarterly meeting
- Facilitate connections between the Board and the broader Social Finance team; ensure Board materials are shared with the Leadership Team and the broader Social Finance team as appropriate; plan additional events (e.g., “Lunch and Learns”) to facilitate relationship development
- Partner with the Executive Assistant to the CEO to ensure smooth logistics for all Board-related events

Knowledge Management & Firm Building (20%)

- Oversee knowledge-sharing efforts across the firm, including:
 - Designing, implementing and managing internal systems and best practices for sharing materials related to programmatic work and learnings
 - Identifying projects or topics for firm-wide readouts using a range of formats (e.g. presentation, fireside chat, etc.)
 - Managing the weekly team meeting agenda as well as the bi-weekly organization-wide knowledge sharing focus
 - Supporting and enhancing firm use of the customer relationship management (CRM) system (currently Salesforce)
 - Overseeing creation of materials at project closeout to capture learnings

- Managing external expert networks and other subscriptions to publications
- Support knowledge sharing efforts between our team and other members of the Social Finance Global Network
- Create communications materials and prepare managers for external calls that could lead to new opportunities
- Contribute to capacity-building initiatives, such as recruiting, professional development, fundraising, or other internal projects
- 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 leading strategic planning and implementation processes; strategy or management consulting experience highly desired.
- Strong project management experience
- Strong analytical and quantitative skills
- 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
- Ability to work with a variety of internal and external stakeholders in a collegial, yet demanding work environment; ability to effectively run meetings and facilitate working groups to achieve goals
- Ability to prioritize tasks, balance multiple assignments, meet deadlines, and thrive in a complex environment with multiple and shifting priorities
- Excellent interpersonal skills; 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 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 (Subject line: AD, Strategy, [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.