



THE
KLARMAN
FAMILY
FOUNDATION

Senior Finance Associate

Boston, Massachusetts

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The Klarman Family Foundation seeks to identify areas of unmet need and to advance solutions to addressing them. Their intention as a Foundation is to help make measurable progress in improving the lives of others. Founded in 1990, The Klarman Family Foundation granted approximately \$86 million in 2022 to advance its philanthropic interests.

Their work is guided by the following principles and values:

- Approaching their work with a seriousness of purpose and evaluative rigor, and also with an openness to tackle issues in new ways.
- Approaching their work with a sense of urgency and willingness to invest based on the opportunities to make a difference, rather than the limits of an annual grantmaking budget.
- A belief that the preservation of democratic norms lies at the core of all of their work and that a healthy democracy is crucial to all the Foundation seeks to achieve.
- A commitment to acting in partnership with other funders as opportunities to learn and leverage greater impact.
- Applying what they learn to improve their philanthropic practices and outcomes.

The Foundation's grantmaking spans several areas of interest:

- Ensuring a healthy democracy.
- Expanding access to vital services and enrichment opportunities throughout Massachusetts.
- Advancing understanding of the biological basis of health and illness.
- Supporting the global Jewish community and Israel.

These issues are complicated, requiring new and creative thinking and persistence over time. With a commitment to learning and assessing impact, these categories and strategies may evolve, but the dedication to applying best practices in philanthropy will remain unchanged.

THE OPPORTUNITY FOR YOU

Reporting to the Controller, the Senior Finance Associate will support the Foundation's finance, benefits, and human resources functions. The ideal candidate will have demonstrated experience with higher-

level accounting responsibilities, budget preparation, a solid understanding of general ledger management, and a strong knowledge of benefits administration. The essential responsibilities of this position include, but are not limited to:

Finance

- Reconcile monthly financial reports, including grant payments between the Foundation's grants management and accounting systems, and staff expenses to credit card statements.
- Prepare the Foundation's annual operating budget (approximately \$8 million), including obtaining input from key stakeholders.
- Support the Foundation's annual tax filing preparation.
- Process Foundation invoices in the Foundation's bill payment system, including uploading and coding invoices, ensuring approvals are obtained for payment, and following up with staff as needed to ensure accuracy.
- Review monthly General Ledger report, prepared by the Foundation's outsourced accounting firm, and recommend updates as needed.
- Maintain and organize the Foundation's financial contracts, including document management, tracking for renewal, and following up with appropriate staff as contracts near end.
- Maintain Foundation memberships and subscriptions, including reviewing for renewal and coordinating with appropriate staff and vendors.
- Coordinate new vendor process with staff and outsourced accounting firm.
- Perform administrative functions related to the Foundation's financial operations, including expense reimbursement support and coordination.
- Support Controller with other accounting and financial matters, as needed.

Benefits and Human Resources

- Coordinate benefits processes for onboarding new hires and offboarding departing employees, with support of the Foundation's outside HR Consultant.
- Coordinate employee leave administration in conjunction with the Foundation's outside HR Consultant.
- Coordinate training related to benefits and human resources compliance.
- Maintain required benefits and compliance notice postings.
- Complete and submit annual benefits filings.
- Complete surveys related to compensation and benefits and compile annual salary benchmarking data for Foundation staff positions.
- Lead the Foundation's Employee Wellness Initiative.
- Support upkeep of documented benefits and HR policies, procedures, and files.
- Support Controller with other benefits and human resources matters, as needed.

THE SKILLS YOU'LL NEED

The Klarman Family Foundation recognizes that a person's skills and competencies can be gleaned in myriad ways, including via life experience. If you do not meet all the qualifications listed, you are still encouraged to apply for this position.

Ideal candidates will have strong analytical and problem-solving skills, outstanding attention to detail, a bachelor's degree, and at least three (3) to five (5) years of relevant professional experience. This position will intersect with all staff across the organization, as well as external partners. They will be a collaborative self-starter and effective communicator.

Core competencies include:

- Bachelor's degree, preferably in accounting or a related field.
- Three to five years of experience in accounting and benefits administration preferred; nonprofit experience a plus.
- Demonstrated numbers orientation with financial analysis, spreadsheet skills, and data entry.
- Proficiency with Microsoft Office Suite (Outlook, Word, Excel, and PowerPoint) products required; advanced Excel skills preferred.
- Experience with Bill.com and Intacct a plus.
- Strong working knowledge of benefits administration and related procedures preferred.
- Proven track record of excellent discretion and ability to handle confidential information.
- Ability to work independently, take initiative, and also seek support from team members in a timely manner when needed.
- Enthusiastic and flexible team player with a positive demeanor, humility, and exceptional client service orientation.
- Organized, detail-oriented, and able to manage and prioritize multiple tasks.
- Committed to a learning orientation and desire for professional growth.
- Reliable and deadline oriented.
- Excellent and clear communication skills, both written and oral.

The salary range for this exempt position is expected to be in the \$85,000 - \$105,000 range depending on prior experiences and skills. Comprehensive benefits for this position include paid leave, health and dental insurance with a flexible spending account and dependent care benefits, a transit account, and a 403(b) retirement plan. The Foundation is committed to professional growth and development for all employees, and to the continued learning and practice required as an organization to build and foster a diverse, equitable, and inclusive workplace.

All Foundation employees are required to be vaccinated for COVID-19 as well as boosted, and the Foundation will require any new employees to be fully vaccinated and boosted by their date of hire as well, absent a medical or religious accommodation as approved by the Foundation.

This position is based in The Klarman Family Foundation's Boston office and is eligible for a hybrid of in-office and working from home. Infrequent travel to conferences may be expected.

TO APPLY

More information about **The Klarman Family Foundation** may be found at: www.klarmanfoundation.org

This search is being led by Reliant Search Partners, LLC – www.reliantsp.com. Due to the pace of this search, candidates are strongly encouraged to apply as soon as possible. Candidates may submit their cover letter, outlining their interest and qualifications, along with their resume via email to Matt Fabian at mfabian@reliantsp.com (508-904-3200).

The Klarman Family Foundation commitment to diversity includes the recognition that our mission is best advanced by contributions of people of diverse backgrounds, beliefs, and culture. Recruiting and mentoring staff to create an inclusive organization that reflects the diverse communities that we serve is a priority, and we encourage applicants of all ages, cultures, races, colors, religions, national or regional origins, disability status, sexual orientation, gender identity, veteran status or other status protected by law.