



Interim Executive Director – UpMobility Foundation

The Community Foundation of Herkimer & Oneida Counties, Inc.

2608 Genesee Street, Utica, NY 13502 | 315-735-8212 | foundationhoc.org

Engage. Invest. Lead.

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| Job Title: | Interim Executive Director – UpMobility Foundation | FLSA Classification: | Full-time, Exempt |
| Department(s) | Special Projects | Reports To: | CFHOC President & CEO |

Overview

The Community Foundation of Herkimer and Oneida Counties, Inc. (CFHOC) is assisting a private foundation, the UpMobility Foundation (UMF) in building a transformational philanthropy strategy, increasing organizational capacity, and refining impact measurement. Formed 9 years ago, UMF has made over \$15MM in philanthropic investments and is poised to significantly increase the scale and scope of its philanthropic activities in a variety of nonprofit initiatives across Central/Upstate NY, the United States and international. For this next phase of its journey, UMF is seeking an Interim Executive Director (Interim) to guide the strategic planning and organizational collaboration with CFHOC and manage/build stakeholder relationships. The Interim Executive Director will also be able to participate as a candidate for the permanent Executive Director position.

Job Summary

The Interim is responsible for advancing UMF into a dynamic and innovative organization that can champion the voice and needs of local, regional, and international community partners. The Interim's primary responsibilities will include strategic planning, board development implementing governance best practices, refining the organization's mission and vision, values, cross-sector collaborations, impact investing, operations, and programming. The Interim will evaluate and redefine aspects of the organization's effectiveness as necessary to proactively lead within the organization and the communities UMF serves. The Interim will report directly to the President and CEO of the CFHOC, in conjunction with the UMF board of directors.

Essential Job Duties and Responsibilities *(Additional duties may be assigned)*

- **Leadership and Strategic Planning**
 - Create and codify a strategic plan and framework to meet immediate and future goals of UMF
 - Create and codify strategic of current and future impact investing of UMF
 - Build project awareness and partnerships with key funders and community stakeholders
 - Facilitate a development plan with UMF board members and CFHOC leadership to strengthen relationships within the board and various constituencies

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- Work with UMF Board to refresh and operationalize bylaws and mission and vision statements
- Support the management of UMF team
- Support the design of the operational/organizational structure of UMF
- Support third party professional services, contracts, and agreements
- Establish and provide necessary communications, reports, and oversee media, social media and website messaging and maintenance

- **Governance**
 - Develop governance best practices, policies, and internal processes through effective board and committee structures including, but not limited to a bylaws refresh, establishing a nominating process, terms of trustees, etc.
 - Facilitate and deliver meaningful board and committee meetings including Board communications, agenda and material development, meeting minutes, etc.
 - Review current business relationships and policies to develop, as necessary, accounting, legal, human resources, risk management and ordinary business operations needs that comply with federal and state law
 - Oversee and manage legal activities, letters of agreement, contracts, leases, and other legal documents and agreements

- **Programming and Community Engagement**
 - Support, promote, and expand current UMF grant making process, programming, and investment opportunities to incorporate strategic purpose
 - Promote UMF and advance strategic goals throughout appropriate stakeholder networks
 - Monitor effectiveness of grant and impact investments and provide quarterly reports to board leadership and stakeholders
 - Support creation of revenue and non-revenue generating investments driven by community needs assessment results and continuous community feedback
 - Refine approaches to assessing the impact of selected initiatives and grant making

- **Finance**
 - Support the implementation of C-Suite to Foundant software program
 - Develop and manage the annual budget, and ensure fiscal responsibility
 - Support and oversight of banking operations, financial projections, and reporting
 - Manage and attract leveraged funding through various sources including, but not limited to, donor/funder development, campaigns, grant writing and sponsorships
 - Oversight of regulatory and legal compliance, including the filing of all required tax documents and financial statements

Supervisory Responsibilities

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This position will lead a well-rounded team and anticipated future roles as the organization grows

Education and Experience

- Bachelor's degree required, Master's degree preferred, in business administration, urban planning, finance, real estate management, nonprofit management
- Three to five years' experience in executive level operations and/or business management required
- Three to five years' in organizational leadership, managing collaborative models, community engagement, event management, community development
- Fundraising experience preferred

Knowledge, Skills, and Abilities

- Strong analytical, critical thinking, decision-making and organizational skills
- Able to oversee multiple projects, priorities, and tasks simultaneously
- Proven cultural competency including socially skillful collaboration
- Excellent interpersonal and communication ability, including writing and making effective presentations to multiple audiences
- Proficient use of technology systems including, Google suite, Microsoft Office products, video conferencing meeting platforms and other business systems
- Demonstrated desire for excellence, accuracy, and details