

# Chief Executive Officer

## Balance

San Francisco, CA (Remote)

Salary: Starting at \$225,000

## BACKGROUND

### The Organization

Established in 1969, BALANCE is a national non-profit organization breaking the cycle of generational poverty by empowering individuals and families to take control of their financial lives. Through partnerships with Government-Sponsored Enterprises, municipalities, employers, credit unions, EAPs, non-profits and financial institutions, we help consumers nationwide achieve financial wellness with end-to-end financial education and counseling.

### The Position

Reporting to the Board of Directors, the CEO will provide strategic and operational leadership to advance our mission of promoting financial wellness through smart money coaching, financial fitness programs, housing, health and finance partnerships, and corporate financial wellness benefits. The ideal candidate will embody our core values, ensuring inclusive and impactful initiatives.

## ROLE OVERVIEW

### Organizational Leadership and Vision

- In partnership with the Board of Directors, develop and execute a strategic vision and roadmap for both existing and future BALANCE programs and activities
- Ensure that the organizational structure and staff resources are aligned to achieve the organization's mission and long-term goals.
- Serve as the primary liaison with the Board Chair and Balance officers, fostering strong, collaborative relationships to drive organizational success.
- Stay up to date with industry standards and trends, and adapt strategies as necessary, ensuring that BALANCE remains at the forefront of innovation and market developments, while also remaining true to its core values.
- Promote communication and collaboration across the organization as well as externally, taking a holistic business approach to providing end-to-end services to support our partners and clients.

### Fundraising and Financial Management

- Design and lead impactful fundraising strategies and program strategies that activate existing and new sources of financial resources that are required to support the mission and the growth of the organization.
- Champion a forward-thinking approach to philanthropy that anticipates and adapts to changing charitable giving landscapes and trends.
- Serve as a dynamic front-line fundraiser, cultivating relationships and securing support from foundations, government sponsored entities corporate partners and other partner relationships to fuel BALANCE's work.
- Ensure the financial health and sustainability of the organization.

### Programs and Partnership Building

- Maintain the high-quality of BALANCE's program models, ensuring that programs and service offerings set and reach mission-aligned goals while meeting financial business case expectations.
- Spearhead the growth and development of less established verticals and identify ways to amplify their impact on individuals and clients and the Balance organization as a whole.
- Identify and secure partnership opportunities within the financial wellness, healthcare and other philanthropic sectors to support our mission.
- Deepen the engagement with existing partners, finding ways to increase and enhance opportunities for support.

### Community Engagement

- Be an advocate for financial wellness within communities of color and advocate for inclusivity within the financial services (?) sector.
- Serve as a brand ambassador, representing the organization to wide audiences, including government, media, and others with a vested interest in BALANCE's work, enhancing our public image, credibility, and reputation.

### Team Leadership and Operations

- Inspire and lead staff, volunteers, and partners to achieve mission-driven goals.
- Exemplify BALANCE's core values while mentoring and inspiring the staff team and providing direct guidance and support to senior leaders.
- Foster a mission-driven and collegial workplace culture, centered on mutual trust, broad communication and accountability, to deliver high-quality services in a healthy work environment
- Ensure that BALANCE's IT and infrastructure systems, processes, and procedures are in place and operationally efficient to effectively support the BALANCE team in achieving their goals.
- Develop the organization's performance management system, setting clear organizational and individual quantitative goals and objectives, and evaluating performance against those metrics on an ongoing basis.

# THE IDEAL CANDIDATE

The ideal candidate for the CEO position possesses the following competencies:

<b>Drives Vision &amp; Purpose</b> Paints a compelling picture of the vision and strategy that motivates others to action.	<b>Communicates Effectively</b> Develops and delivers multi-mode communications that convey a clear understanding of the unique needs of different audiences.	<b>Decision Quality</b> Makes good and timely decisions that keep the organization moving forward.
<b>Builds Effective Teams</b> Builds strong teams with a strong identity that apply their diverse skills and perspectives to achieve common goals.	<b>Courage</b> Steps up to address difficult issues, saying what needs to be said.	<b>Drives Results</b> Consistently achieves results, even under tough circumstances.

## Additional Qualifications

- Passionate drive to serve marginalized, unbanked/underserved populations
- Strong track record of partnering with a Board of Directors and instilling a cohesive, positive and energetic work environment
- Strong business acumen, with an eye to profitability in order to ensure financial sustainability
- Analytical mindset, utilizing data and metrics to support optimal leadership decision-making
- Compelling storyteller, able to convey BALANCE's impact and the importance of the mission
- Strategic, visionary thinker, team builder that achieves the mission to develop and lead strategy with Board and staff involvement
- Proven leadership experience in bringing concepts and initiatives to scale
- Demonstrated commitment to BALANCE's core values of inclusion, excellence, impact, compassion and integrity.
- Experience with and understanding of CDFI organizations, credit unions and other financial services institutions, financial technology (Fintech) firms, as well as with regulatory agencies and compliance.

## WHO WE ARE

### Our Vision

The most trusted source for financial advice in the nation, inspiring and empowering people from all walks of life to achieve their financial dreams.

### Our Mission

Your financial guide dedicated to helping you balance life's important decisions.

### Work Environment

BALANCE is a San Francisco-based organization, with a distributed workforce across the entire United States. We are led by our core values of inclusion, excellence, impact, compassion, and integrity to meet our mission.

### Our Commitment to Diversity, Equity, & Inclusion

BALANCE is committed to fostering a diverse workforce, and maintaining a workplace that is equitable, inclusive, and safe for all employees. We not only recognize that you, our employees, comprise a wide range of backgrounds and characteristics, but we believe those differences should be celebrated and valued. Whether it's race, religion, gender, national origin, ancestry, color, language, age, marital status, sexual orientation, gender identity, gender expression, physical or mental disability, medical condition, genetic information/characteristics, veteran status, political affiliation, or any other characteristic, these are parts of each of you that contribute to your experiences as humans, and ultimately to the knowledge and expertise that make you a valuable asset to the Company.

BALANCE is committed and determined that there be access, opportunity, and advancement for all individuals. We will always strive for ways in which we can cultivate an inclusive work environment, strengthen our cultural competency, and train our managers and employees to provide opportunities for growth and development equitably. It is our intention that all of our employees, regardless of any particular background or characteristic, are always treated with respect and dignity. Likewise, we expect that as our employees, you will treat your coworkers, supervisors, and other team members with the same dignity and respect at all times.

## COMPENSATION AND BENEFITS

### Salary

Starting at \$225,000

### Benefits

- Generous Paid Time Off, including leave policies for School and Child Care Activities, Voting, Bereavement, etc.
- Health, dental, vision, and life insurance offerings
- 401k Plan with a company match

## TIMELINE AND NEXT STEPS

If you are interested in this position, please [click here](#). All applicants will receive an email confirming receipt of their application.

We encourage candidates of all backgrounds to apply even if you do not meet all of the qualifications outlined above. If you are selected to move forward for an initial screening call, we expect you to hear from us by November.

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[Submit an application](#)