AdminiTrust
May and Stanley Smith Charitable Trust
Program Officer, Elders

AdminiTrust, an organization that administers private foundations and trusts, seeks an Program Officer with knowledge in the field of service to older adults to manage the Elders grantmaking portfolio of the May and Stanley Smith Charitable Trust.

Located in Sausalito, California, AdminiTrust LLC provides administrative and management services to private foundations, and currently manages the portfolios of two foundations providing grants internationally totaling $14.5 million annually. The Program Officer will lead and manage the $3.5M Elders grantmaking portfolio, comprised of approximately 75 grants.

BACKGROUND

Stanley Smith was a successful Australian businessman with interests in mining and international trade when he met May, a Chinese national working as a translator in Hong Kong. They married and during their lifetimes they practiced a quiet, modest generosity with interests ranging from education to horticulture. Mr. Smith passed away in 1968 and Mrs. Smith in 2006. The May and Stanley Smith Charitable Trust (MSSCT) was founded in 1989 and gives the Trustees broad powers to determine the funding interests of the Trust. Though Mrs. Smith was never directly involved in the activities of the Trust, she made several suggestions for grants when the Trust was established. Modeled on the Smiths’ giving style, the Trust does not seek publicity or recognition for its work, thereby respecting and acknowledging the expertise of its grantees and emphasizing their efforts and success.

Over the years, the Trustees have used the Smiths’ personal examples of individual achievement given opportunity and effort, along with Mrs. Smith’s own suggestions for grants, to define the scope of the Trust’s activities. Most grants provide direct operating support for services that develop the capacity of individuals to realize their potential and improve their quality of life. The Trust is in the midst of a strategic planning process, intended to refine and narrow the grantmaking within each program area, to allow for deeper engagement with grantees and more intentional funding toward specific goals. With a recent geographic refocusing related to this process, beginning in 2014, the majority of the Trust’s grantmaking will support organizations working in the Western Region of the United States and British Columbia, Canada. A small number of Trustee discretionary grants are also made in areas where the Smiths lived or worked during their lifetimes: Hong Kong, Australia, the UK, and the Bahamas.

The Trust is governed by a three-person Board of Trustees. The financial assets of the Trust are valued at approximately $380 million. The Trust has provided over $190 million in grants since inception, including 379 grants in 2012 totaling $12 million.

AdminiTrust is a small (6 employees), professionally run office that employs experienced and accomplished program officers and staff who work in an informal, team-oriented environment. AdminiTrust and its people strive to truly interpret the wishes of the founders and Trustees to
faithfully see their intent realized. The organization emphasizes thorough due diligence in evaluating requests and in being open and responsive to inquiries. AdminiTrust/MSSCT is acknowledged by grantees as being a supportive, engaged, hands-on and respectful partner.

**BASIC FUNCTION**

The Program Officer manages the Trust’s Elders grantmaking portfolio. The Program Officer undertakes initial screening of potential grantees; conducts review and analysis of proposals; makes funding recommendations; prepares docket materials; manages and monitors active grants; prepares post-grant assessments; and arranges and attends meetings with current and prospective grantees. The Program Officer may be involved in non-grantmaking activities such as program development and strategic planning.

The Trust is currently undergoing a strategic planning process, and the Program Officer must have significant knowledge in the field of service to older adults in order to participate in the development and implementation of the plan. The Program Officer reports to the Program Director, and works closely with three other program officers and the grants manager.

**PRINCIPAL RESPONSIBILITIES**

The Program Officer will have the following duties and responsibilities:

- Assists the Program Director, Administrator, and Board of Trustees in examining, developing, implementing, documenting, and communicating the goals, priorities, and strategies of the foundation;
- Serves as a liaison between the foundation and grant seekers;
- Reviews and assesses solicited and/or unsolicited letters of intent and grant proposals;
- Works with grantee organizations to develop and refine grant proposals;
- Researches applicant organizations, compiles information specific to grant proposals, collects background information;
- Participates in internal team review of grant applications;
- Prepares and presents written proposal summaries, analyses, and recommendations for internal review and eventual presentation to the Administrator and the Board of Trustees;
- Assists with the development and preparation of grant docket materials;
- Prepares the grant agreement and evaluation plan for individual grants when required;
- Participates in the development and implementation of an evaluation program for grants;
- Facilitates grants monitoring, reviews and evaluates reports, follows up with grantee to obtain additional information, ensures grantee compliance with contractual agreement, and serves as primary contact in negotiating and resolving issues for grantees;
- Periodically reviews and reports on the overall effectiveness of the grantmaking program;
• Reviews and remains current in issues and trends in philanthropy and specific program areas of interest to the foundation;
• Participates in development of communication materials and website maintenance;
• Identifies and undertakes professional development and training;
• Undertakes other duties or projects as assigned or initiated.

**IDEAL EXPERIENCE**
The Program Officer should have the following types of experiences and qualifications:

• Bachelor’s degree required; Master’s degree preferred;
• Minimum of 5 years’ experience as a practitioner or funder in the field of aging/services for older adults;
• Previous experience working for a private or community foundation highly desired;
• Knowledge of best practices, and legal, accounting, and regulatory requirements for grantmaking; understanding of IRS regulations regarding nonprofits;
• Proficient in basic financial analysis;
• Excellent written, verbal, analytical, and interpersonal skills;
• Strong computer skills with proficiency in Word, Excel, and MicroEdge GIFTS.

**PERSONAL CHARACTERISTICS**
The Program Officer should have the following sensibilities:

• Mission-driven, with a belief in and commitment to the areas the Trust supports;
• Professional demeanor demonstrating respect, integrity, discretion, judgment, maturity, and flexibility to represent the foundation in diverse forums and organizational relationships;
• Strong work ethic; a high degree of initiative and energy; productive and results-oriented; a “doer” with a willingness to work hands-on in developing and executing a variety of process and grantmaking activities;
• Well-organized with concern for details, accuracy, and deadlines, and the ability to set realistic goals and objectives, and balance multiple priorities;
• Reflective, with strong conceptual, critical, and creative thinking abilities;
• Willingness to participate in the general workflow of a small, team-oriented office;
• Committed to continuous improvement in self and organization.

For more information please contact:
Lisa Grossman
(650) 323-3565 or lisag@moppenheim.com

**m/Oppenheim Associates**
221 Main Street, Suite 540
San Francisco, CA 94105