



DIRECTOR OF DEVELOPMENT & COMMUNICATIONS

CONFLUENCE PHILANTHROPY

New York, New York

[Confluence Philanthropy](#)



The Aspen Leadership Group is proud to partner with Confluence Philanthropy in the search for a Director of Development & Communications.

The Director of Development & Communications will oversee a comprehensive communications program consistent with Confluence Philanthropy's values-aligned investment mission and develop and execute on annual fundraising plans.

Confluence Philanthropy's mission is to transform the practice of investing by aligning capital with its community's values of sustainability, equity, and justice. Its goal is to build a vibrant community of practice and support its members to learn from each other, connect, collaborate, and influence the flow of capital to ultimately transform the practice of investing. It strongly encourages peer learning, resource sharing, and leadership development.

Confluence Philanthropy supports and catalyzes a membership network of private, public, and community foundations; family offices; individual donors; and their values-aligned investment advisors representing more than \$92 billion in philanthropic assets under management, and over \$3.5 trillion in managed capital. Members are committed to full portfolio activation when prudent and feasible.

Based in the United States, Europe, Latin America, and Canada, Confluence's members invest around the world. Members represent a diversity of institutions, charitable asset types, and programmatic missions, and while they play various personal and professional roles, they all share a commitment to values-aligned capital management.

Confluence translates learning and connection into concrete action through its annual conferences, webinars, and trainings. It organizes working groups that focus on specific investment themes including climate solutions, racial equity, investing in partnership with Native American communities, and active ownership.

All investments have an impact. Confluence promotes values alignment across asset classes, investment vehicles, and advocacy strategies. This includes cash, proxy voting, shareholder engagement, program-related investing, screening public equities, and private equity. Confluence believes that investors should not compromise what matters to them in exchange for financial return. By aligning capital in all its forms with their core community values, an economy can be built that is sustainable and that takes care of people and the planet, together.

VALUES-ALIGNED INVESTING

Confluence Philanthropy defines *Mission-Related Investing* as the practice of harmonizing a charitable organization's mission for social or environmental 'impact' with the management and investment of assets while sustaining long-term financial return.

While the concept of *mission* investing makes a great deal of sense for philanthropic and non-profit institutions carrying a legal social change mandate, for individual investors and institutions without a primarily charitable intent, the concept of *impact* can feel like a better fit.

While the term *Impact Investing* has been adopted by many progressive investors, the trouble is that all investments have an impact. After nearly a decade, impact investors still have not agreed upon what creates *true impact*, what is the appropriate rate of return for an impact investment, and whether or not impact can really be achieved across all asset classes. Thus, Impact Investing has become a confusing term that may refer to all kinds of investment practices.

Attitudinal research demonstrates that racially diverse managers shy away from the impact moniker claiming that it connotes lower rates of return and a higher risk among too many investors. Already faced by bias, labeling an impact brand to the chest can hurt more than help. Although faced with other kinds of bias, innovative sustainability focused asset managers feel the same challenges. And yet, ironically, research demonstrates again and again that diverse managers and sustainability funds often outperform conventional managers and their practices.

For all these reasons, and more, Confluence has decided to step back from the use of the terms Mission-Related Investing and Impact Investing. Instead it describes its style of investing as *values-aligned investing*. Values don't need to be explained nor measured by rates of return. They speak for themselves in the decisions made about where money is placed.

REPORTING RELATIONSHIPS

The Director of Development & Communications will report to the Managing Director, David Estrada.

FROM THE MANAGING DIRECTOR

Confluence Philanthropy's work is focused on supporting and amplifying the voices of our incredible network of foundations and investment advisors committed to building a more sustainable and just world. We work with some of the most influential philanthropists and advisors around the world and are often viewed as peers in advancing shared goals of addressing climate change and social justice issues at scale. Confluence is now looking for a Development and Communications professional to help our small but mighty team, to uplift the the work of our members, and build our organizational resources in order to expand team and our collective impact. The successful candidate and colleague understands the field of values-aligned investing (or impact investing), is a passionate servant-leader, and brings a thoughtful, organized, and systematic approach to managing funder relationships, outreach, requests, and reporting.

—David Estrada, Managing Director

DIVERSITY, EQUITY, AND INCLUSION

Diversity, equity, and inclusion are at the heart of Confluence Philanthropy's work. It seeks to hire diverse talent and foster an environment where all talent can thrive and grow their careers. It also centers DE&I in its work. Last year, it launched the [*Belonging Pledge*](#), a commitment by its members to advance racial equity. Confluence seeks to continually examine its own culture, identifying areas where it can further improve its own inclusiveness and equity. It does so while supporting and pushing its members to do the same.

PRIMARY RESPONSIBILITIES

The Director of Development & Communications will

- lead the team in devising and supporting the implementation of annual fundraising and cultivation plans;
- support the ongoing development and stewardship of funder and prospect relationships with individuals, foundations, and corporations through donor-centered funder and prospect communications incorporating stewardship best practices;
- work closely with the program teams to develop and submit funding requests, including grants and sponsorships;
- conduct topical research and collaborate with a range of partners, members, and external organizations to create successful proposals;
- oversee the design, development, and dissemination of all print and online development communications that promote Confluence's brand and mission, including annual reports, grant reports, visibility campaigns, press releases, website content and blog posts, event promos and mailings, as well as generate content using compelling member stories, data, infographics, and information provided by program staff;
- develop and execute on a comprehensive communications plan, aligned with annual fundraising plans in collaboration with senior leadership;
- develop and nurture relationships with journalists and media outlets covering the investment community; and
- work with the Digital Associate to implement and manage the social media strategy and presence for Confluence programs and events, including coordinating and organizing content from members and staff.

LEADERSHIP AND KEY COLLEAGUES

Dana Lanza

President, Chief Executive Officer, and Co-Founder

Dana Lanza launched Confluence Philanthropy in August of 2009 as a special project of Rockefeller Philanthropy Advisors, after serving as the Executive Director of the Environmental Grantmakers Association (EGA). While at EGA, Dana provided networking services to over 250 grantmaking organizations from across North America and Europe in 15 strategic funding areas. As Director, Dana worked with the Rockefeller Family Fund, and led a then 20 year old EGA into an independent 501(c)(3) organization.

From 2009-2011 Dana served as the Program Director and Board Advisor at The Swift Foundation while launching Confluence. Swift makes grants internationally in the environment, indigenous and rural communities, and climate change initiatives. Swift is also deeply committed to mission-related investing.

Prior to Philanthropy, Dana founded Literacy for Environmental Justice (LEJ), which brought free urban environmental education projects to more than 10,000 public school students, while employing hundreds of at risk youth as community advocates. She acted as a lead organizer in the closure of San Francisco's infamous Hunters Point Power Plant; envisioning and raising funds to supplant it with the region's first off-the-grid educational Eco Center. The Eco Center won the EPA's National Environmental Justice Award after its grand opening in 2010. A recipient of several environmental awards, she has presented at Bioneers, the American Public Health Association, Investors' Circle, and the European Foundation Center, among others. In 2005, she contributed to the Sierra Club Books anthology entitled *Ecological Literacy: Educating Our Children for a Sustainable World*. She was a fellow with the Donnell Meadows Leaders Fellowship Program in Systems Theory and the California Women's Foundation Policy Institute.

Beyond this, Dana has lived and worked among tribal people for much of her life. At 20 she lived at the village level among the Samburu (Maasai) for eight years. Twenty-four years later she undertook the Samburu's traditional rites, becoming one of the few westerners ever initiated and a daughter of the L'Lorokgushu clan. More briefly Dana lived and worked with the Cheyenne River Lakota in South Dakota, and Kosovan Roma refugees in Europe. Dana speaks Swahili, Maa, and Spanish conversationally. A nomad in spirit, Dana lives in Fahnestock State Park in the Hudson Valley; and migrates between there, Brooklyn, and Kenya.

David Estrada

Managing Director

David Estrada is based in New York City and is passionate about the role of progressive philanthropy in addressing the world's most critical challenges. He joined Confluence Philanthropy in 2017, after more than a decade leading successful partnerships with private foundations and CSR programs in the areas of global health, economic development and social entrepreneurship.

Prior to Confluence, he served as Director of External Relations at KickStart International, a leading social enterprise which brings together philanthropy, innovative financing, and the private sector to design and sell tools to help developing-world entrepreneurs lift themselves out of poverty. While there, he worked closely with foundations, family offices and corporations to build long-term and mission-aligned partnerships to scale KickStart's B2B distribution model across 14 countries in Africa. David also led the communications strategy, overseeing online and print collateral development, as well as securing press coverage through the Clinton Global Initiative, *The Chronicle of Philanthropy*, *CNBC Africa*, *Forbes*, and *The Huffington Post*, among others.

Previously, David worked in global health at the International AIDS Vaccine Initiative where he grew a portfolio of corporate funding partners. He has also managed a direct mail program at the Alliance for Lupus Research. David is a graduate of Cornell University and holds a certificate in non-profit management from UIC.

In his free time, David can be found painting, practicing another language, or filling his passport with new stamps.

Michael Francisco-McGuire

Chief Operating Officer

As COO, Michael Francisco-McGuire leads Confluence's operational functions and day-to-day program management and is responsible for ensuring the financial health of the organization. He joined Confluence Philanthropy with over 20 years of experience in non-profit operations, events, and cross-sector partnership building.

Michael is deeply committed to advancing racial justice, fighting climate change, and working at the intersection of the two. He is passionate about mission-aligned investing's impact on the biggest issues of our time.

Most recently, Michael served as Managing Director of Operations at iMentor, a non-profit dedicated to mentoring students from low-income communities. He built the operational infrastructure needed to grow from 60 employees in New York to over 150 across the United States. Previously, Michael was one of the founding employees of The Climate Group, a global network of business, government, and non-profit organizations dedicated to expanding the clean energy economy. Initially responsible for member services, fundraising, and events, Michael helped The Climate Group grow to 150 employees across five continents, serving thousands of members. Then, as Director of Operations for The Climate Group's New York office, he continued to implement both regional and international infrastructure critical to The Climate Group's success.

Michael holds an M.A. in Public Administration from New York University and is a dedicated father of two young children.

PREFERRED COMPETENCIES AND QUALIFICATIONS

Confluence Philanthropy seeks a Director of Development & Communications with

- a commitment to Confluence Philanthropy's mission and a passion for environmental and socially responsible investing and/or innovations in the philanthropic, social enterprise, and non-profit sectors;
- a demonstrated understanding of the field of impact investing;
- strong written and oral communication skills;
- an ability to organize ideas, synthesize information, and turn objectives and messages into compelling and succinct narratives for philanthropic support;
- fluency with technology in marketing and communications, and experience managing social media campaigns and strategies;
- attention to detail, highly developed organizational skills, an efficient and self-directed work style, and a belief that no task is too big or too small;
- an ability to perform well under pressure, with patience and a sense of humor;
- design experience (Adobe Suite preferred); and
- skill with CRM systems (Salesforce preferred) to track opportunities and maintain relationships.

A bachelor's degree is required for this position as is at least five years of fundraising and/or marketing experience in a field with relevance to values-aligned investing.

SALARY & BENEFITS

Confluence Philanthropy offers a competitive compensation and benefits package including healthcare and retirement.

LOCATION

This position is located in New York City. Staff are currently working remotely due to Covid-19 restrictions.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. ***Cover letters should be responsive to the mission of Confluence Philanthropy as well as the responsibilities and qualifications presented in the prospectus.*** Review of applications will begin immediately and will continue until the successful candidate has been selected.

To apply for this position, visit:

[Director of Development & Communications, Confluence Philanthropy.](#)

To nominate a candidate, please contact Gregory Leet:

gregoryleet@aspenleadershipgroup.com.

All inquiries will be held in confidence