

Position Profile

*On behalf of our client, the **Otto Bremer Trust**,
CohenTaylor Executive Search Services
is conducting a retained executive search for its*

Program Officer



The Otto Bremer Trust at a glance

- Founded by banker and civic leader Otto Bremer in 1944
- Mission: Investing in people, places, and opportunities in the Upper Midwest
- More than \$1 billion in assets
- 2018 grants and program-related investments totaling \$50.5 million to nearly 600 organizations throughout the region
- Over \$700 million invested since founding
- Three approaches to investing for maximum impact:
 - [Social Return](#)
 - [Hybrid Return](#)
 - [Financial Return](#)
- Office located in downtown St. Paul, Minnesota
- Staff of 22 employees

The Otto Bremer Trust

The Otto Bremer Trust is one of the nation’s largest charitable trusts. Created in 1944 by banker and community leader Otto Bremer, the Trust was established to perpetuate his life’s work of serving as a financial resource to communities in the Upper Midwest. The Otto Bremer Trust is a unique organization spanning banking, investments, and philanthropy, with each serving a specific purpose, working together to deliver positive impact in the communities it serves. One hundred percent of the Trust’s assets are put to work for its mission—and have been since 1944. Making investments in nonprofits and other qualified organizations working to improve lives in the Upper Midwest is a primary part of the Trust’s work. In 2018, the Trust made grants and program-related investments totaling \$50.5 million to 591 organizations throughout the region.

The Otto Bremer Trust looks to respond to needs and opportunities that are identified by the communities where it operates and are in alignment with the Trust’s purposes. The philanthropy team carefully reviews applications, leading to recommended investments that make a positive difference in our communities.

The Otto Bremer Trust has a current staff of 22, all based in its Saint Paul, MN office, with a regional focus in North Dakota,

Minnesota, and Wisconsin. The work environment is collegial across Program, Operations, and Co-CEOs & Trustees, encouraging information sharing, team work and critical thought. While cooperation is a core value, much of program staff’s work is done independently, calling for balancing responsibilities to the Trust, program work, and other team members.

More information about the Otto Bremer Trust can be found on its [website](#) as well as on the following social media channels: [Facebook](#), [Twitter](#), and [LinkedIn](#).

The Program Officer

Based in its Saint Paul office, the Otto Bremer Trust is seeking a Program Officer with a fundamental belief in communities’ ability to respond and address their challenges and opportunities. A Program Officer has an opportunity to engage with and learn from communities through relationship building, understanding the individuality of the communities the Trust funds, and analyzing and assessing investment opportunities. This position will have primary responsibility for covering the Trust’s Greater Bremer Region—communities located outside of the Twin Cities.

Position Profile: Program Officer

The Program Officer brings grant applications to life through presence in the Trust's Greater Bremer Region communities. By conducting due diligence and making recommendations to the Co-CEOs & Trustees regarding grant requests, this position helps the Trust understand community opportunities and challenges as well as a specific nonprofit's capacity. Through discovery, the Program Officer will gain relevant information and knowledge and communicate clear, reasoned recommendations to the Trustees for grant consideration.

The Program Officer is part of a regional program team and will report directly to a Regional Director. The Program Officer must be willing and able to travel an average of two to four trips throughout the region per quarter to carry out program activities, learning sessions, grantee site visits, and other responsibilities that require in-person attendance.

It is estimated that 80 percent of the Program Officer's role will be spent on the grant application process, and 20 percent will be spent on work supportive of the grant application process. Essential functions include:

Grant Application Process

- **Inquiries.** Respond to inquiries from prospective grantees and assist nonprofit organizations in their interactions with the Trust in order to maximize their understanding of the Trust and the grant making process.
- **Assess proposals and conduct due diligence**
 - Analyze a program or organization's potential for accomplishing its goals and its potential for meeting needs and/or building on opportunities in the region (see criteria in "make recommendations" section below).
 - Conduct site visits (significant travel required across the Trust's region including Minnesota, North Dakota and Western Wisconsin).
 - Consult with community stakeholders and issue experts.
 - Analyze programs and organizations that cross a wide array of issues including but not limited to economic development, youth development, basic needs, and health.
 - Utilize understanding of changing regional needs and emerging opportunities as well as the work of other nonprofits in a specific sector.
- **Make recommendations.** In clear, concise, written memoranda, make timely recommendations to the Co-CEOs & Trustees about appropriate responses to proposals. Recommendations should reflect:
 - Analysis of program or organization's potential for accomplishing its goals and its understanding of issue(s) being addressed.
 - Analysis of organization's financial position (based on documents including income and expense statements, balance sheets, audits and tax returns).
 - Analysis of the intersection between the needs and opportunities in the region and the work explained in the proposal.
 - Analysis of program or organization's evaluation framework.
- **Provide data as requested.** Work with grants administration team to provide timely information and updates regarding requested data such as prospective grantees' project costs, amounts requested, nonprofit status, grant purpose, and other needed information.

Position Profile: Program Officer

- **Ongoing program responsibilities**
 - Manage pertinent changes to grants and/or grantees.
 - Review grantee reports and conducts analysis of progress toward outlined goals.
 - Work with regional team to evaluate the impact the Trust's grant making on a geographical and/or issue level.
- **Regional engagement**
 - Work with regional team to strengthen and maintain the Trust's knowledge of relevant regional information and trends.
 - Develop relationships with community stakeholders including nonprofits, philanthropic peers and public sector.
 - Work with regional team to develop community engagement opportunities that foster meaningful dialogue to provide understanding of important dynamics, issues, and priorities impacting communities.
 - Utilize information gained from site visits, regional data, community engagement or other sources to develop geographical and issue briefings and/or memoranda.
 - Work with regional team to evaluate how the Trust can continue to frame its grant making across a wide array of geographies and issues impacting communities.

Work Supportive of the Grant Application Process

- **Contributions to knowledge management and special projects**
 - Review literature and reports and pursue opportunities to learn and stay current in specific assigned topic areas.
 - Understand how to utilize data and other sources of information to inform recommendations, strengthen knowledge of region and share with internal and external sources.
 - Assist in external communications including website content, social media, public presentations, and news articles as appropriate.
 - Support special projects as assigned.
- **Relationship management**
 - Foster and maintain positive relationships with grantees.
 - Foster and maintain working relationships with and among community stakeholders.
 - Represent the Trust in the community.
 - Work closely with the Trust's program staff to facilitate cross-region collaboration and learning.
- **Professional development.** Work with Regional Director to design and implement plans to advance professional growth and to keep current with relevant issues in philanthropy and in the communities served by the Trust.

First Year Priorities

During the first year of employment, the Program Officer will be expected to:

- Thoroughly immerse herself/himself in the Trust's mission, philosophy, staff, grantees, structure and operations, constituencies, organizational culture, and values;
- Become knowledgeable about the Trust's strategically responsive grantmaking, grant guidelines, and geography; and

- Develop the ability to communicate the Trust’s approach at a high level and in an effective manner.

The Ideal Candidate

Program Officers excel by using strong communication skills, relationship building, critical thinking, problem solving, and culturally competent approaches to engage communities and nonprofits on behalf of the Trust. Candidates should have a minimum of ten years of professional work experience.

Criteria for Success

The ideal Program Officer will increase the capacity of the Otto Bremer Trust. While no one candidate will have all the criteria enumerated below, the ideal candidate will possess many of the following professional and personal abilities, attributes, and experiences:

Skills

- Strong record of achievement, career progression, and personal experience that ensures a deep understanding of a nonprofit’s role within a community context and environment.
- Experience working with geographically diverse communities, including low-income and multi-ethnic communities with a commitment to cultural competency.
- Ability to thrive when working under deadlines; strong project and time management skills; and the ability to handle multiple tasks simultaneously without sacrificing attention to detail.
- Experience using data for ongoing learning and improvement; excellent quantitative and qualitative analytical skills; comfort analyzing disparate and even contradictory information.
- Excellent written and oral communications skills, and ability to successfully navigate and translate information for technical and non-technical audiences. This includes the ability to adjust communication style for internal and external audiences.
- Demonstrated financial analysis skills, including the ability to analyze audited financials, balance sheets, and business plans of nonprofit organizations. Proficiency with complex financial instruments is desirable.
- Ability to handle confidential information with complete discretion.

Competencies

- Intellectual agility and the ability to analyze, think critically and understand emerging issues that are directly relevant to the communities the Trust serves and the populations it supports.
- Outstanding written and oral communication skills, with the presence and credibility to develop and sustain a broad range of relationships; and highly developed listening skills.
- Exceptional reasoning and problem-solving abilities; proven track record in solving complex and dynamic problems.
- A commitment to personal learning and development and openness to feedback.
- Adaptability and flexibility with ability to thrive in results-oriented culture with limited guidance.
- The ability to foster collaboration and contribute to a strong sense of community among staff and Trustees.

Position Profile: Program Officer

- Excellent interpersonal skills, including experience building relationships; demonstrated success in working with a diverse group of peers, community stakeholders, and grantees with differing backgrounds and experiences.
- Skilled at thinking, working, and confidently making sound decisions and recommendations independently while also engaging, respecting, and remaining open to others' contributions; listening well and collaborating to land on a mutually agreed upon approach.
- Insightful and creative in problem-solving, with a demonstrated ability to leverage diverse resources and opportunities.
- The willingness to travel up to 25 percent of the time to carry out program activities, learning sessions, grantee site visits, and other responsibilities that require in-person attendance.

To Apply

To apply, please submit your resume and cover letter to Beau Bye, Executive Recruiter and Vice President at CohenTaylor, at beau@cohentaylor.com. Applications will be accepted until Friday, April 26. All inquiries will remain confidential.