

# POSITION PROFILE

## The Community Foundation of South Puget Sound



253.693.2780

[www.hagelsearch.com](http://www.hagelsearch.com)

### ***President & CEO***

Located in Olympia, WA, the Community Foundation of South Puget Sound has embarked on a search for a new President and CEO to succeed its long term CEO who plans to retire at the end of September.

The CEO works with and reports to the Foundation's fifteen member volunteer Board of Directors. The CEO is responsible for and has authority over day to day operations of the Foundation and works in concert with the board on strategic planning, financial planning and policy development. She/he works with a small but mighty staff of three other professionals who are highly respected in the South Sound community.

The Foundation's service area covers Thurston, Mason and Lewis Counties with grants being made in each of those counties.

The Community Foundation has assets in excess of \$25 million and makes grants of more than \$1 million per year. Foundation operations are supported primarily through administrative fees paid by fund-holders.





# The Community Foundation of South Puget Sound

A catalyst for charitable giving in Thurston, Lewis and Mason counties.

Community residents have utilized the Foundation to make their charitable gifts more effective since 1989. The Foundation provides maximum flexibility in establishing, managing, and distributing charitable gifts.

Through donors' generosity, the Foundation supports a wide variety of arts, education, health and human services, and environmental projects.

The Foundation holds over 95 separate funds, serves three counties, distributes more than one million dollars in grants and scholarships each year, and assets under management have grown to \$25 million.



More than \$13 million in grants and scholarships have been awarded since the inception of the Community Foundation.

For more information go to: [thecommunityfoundation.com](http://thecommunityfoundation.com)

## MISSION

*To inspire philanthropic efforts that enrich our communities.*

The Community Foundation of South Puget Sound manages charitable gifts from individual donors and businesses. The proceeds from these funds generate grants and scholarships today, while preserving resources for tomorrow's community priorities.



### To fulfill its mission, the Community Foundation of South Puget Sound:

#### Connects...

People who care with causes that matter to them. We are respected for our community knowledge. We offer flexible giving options and provide local stewardship of donated funds.

#### Contributes...

To local communities through a strategic grantmaking program that is flexible, visionary, and inclusive. We are recognized for proactively identifying and funding critical community needs.

#### Collaborates...

With other community partners to create a learning culture that strives for constant improvement and innovation to foster growth and change.

# Community Foundation's *Strengths, Focus & Opportunities*



## Strengths

- The Foundation is a highly regarded force in promoting philanthropy in the South Sound through its engagement with community nonprofits and its **"Give Local"** Campaign
- Donor trust in the Foundation is extremely high
- The Foundation has had steady growth holding more than 90 funds representing \$25M in assets with more than \$10M as unrestricted assets
- An exceptionally talented Foundation staff conducts the day to day work of the Foundation



## Initial (First 18 months) Focus for the President & CEO

- Focus on developing and maintaining positive relationships with Board members, key stakeholders and other community leaders
- In partnership with the Board, develop and implement strategic directions, goals and priorities with supporting financial plans
- Build trusting and transparent relationships with staff and assess the capacity of the current level of staff to support future growth
- Develop and implement plan to build operating reserves



## Challenges & Opportunities

- The Foundation has the opportunity to take an even greater role in promoting collaboration between community-based organizations to maximize their benefit to the community
- With a clearly stated value proposition the Foundation has a great opportunity to assist wealth advisors with the immense transfer of wealth caused by Baby Boomer retirements
- Opportunity and challenge both exist to engage the philanthropic mindset of our maturing young generations in participating in broad community philanthropic efforts

# THE POSITION



## The ideal candidate will possess the following personal attributes:

- Action-oriented
- Active listener
- Approachable
- Authentic
- Energetic
- Healthy sense of humor
- Leader and Collaborator
- Passionate about community
- Person of highest integrity
- Personable, approachable
- Persuasive
- Relationship builder
- Respectful and respected
- Thoughtful risk-taker
- Transparent

## The ideal candidate will exhibit the following behavioral and professional competencies:

**Visionary** – Confronts the complex realities of the environment and simultaneously maintains faith in a different and better future, providing purpose, direction and motivation

**Team Builder** – Ensures that the right people are in the right roles at the right times; fostering commitment, trust, and collaboration among multi-cultural leaders and stakeholders

**Resource Development** - Provides the leadership necessary in identifying and maximizing financial support from all sources, traditional and non-traditional, that can be mobilized for organizational impact

**Collaborator** – Understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement

**Business Acumen** – Possesses a high-level of broad business and management skills and is effective at managing the financial resources of the organization

**Relationship-Oriented** – Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.

**Results-Driven** - Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact

**Network Oriented** – Values the power of networks; serving to leverage the organization's breadth of community presence, relationship, and strategy.

**Mission-Focused** – Committed to create organizational change that supports the mission

**Outward-Turning** – Understands the dynamics of local, regional, and national environments, and works on an agenda rooted in the community's own perception of its needs and aspirations

**Governance and Voluntarism** - Values the roles that volunteers play in the organization in its operations, governance and fiduciary responsibilities

**Brand-Steward** – Is a steward of the brand and understands his/her role in growing and protecting the reputation of the organization

## WORKING RELATIONSHIPS

The President & CEO is expected to interact with the following on a regular basis. Teamwork and a professional public presence are essential.

- Current and potential donors and fund-holders
- Board of Directors members
- Volunteer committee members
- Staff members
- Top community and business leaders in all sectors
- Nonprofit organization leaders
- Grant recipients
- Top elected and public officials at the state, county and local levels
- Wealth managers, estate planning attorneys, CPAs and other professional advisors

## DESIRED QUALIFICATIONS

BA or commensurate experience, advanced degree a plus. Seven or more years of demonstrated, progressive management and leadership success. Leadership experience with foundations or other nonprofit organizations desirable. Strong business and financial acumen. Estate planning and wealth management experience a plus. Experience working with a nonprofit board of directors. Demonstrated experience and commitment to the principles of diversity, equity and inclusion required. Demonstrated ability to empower, mentor, motivate and engage volunteers, staff and stakeholders

## COMPENSATION & BENEFITS

The Foundation offers a competitive salary and a strong benefit package including health and retirement.





## LIVING & WORKING IN SOUTH PUGET SOUND

The Community Foundation of South Puget Sound is located in Washington State's beautiful capital of Olympia. Olympia and its sister cities of Tumwater and Lacey have a diverse economy, fueled by a substantial base of employment in state government. The Community Foundation serves Thurston, Lewis and Mason Counties. Surrounded by mountains and water, the South Sound features picture-perfect views and abundant recreational opportunities year-round. The cities offer a variety of eclectic shopping and dining experiences, while Olympia's westside is a regional shopping destination with numerous national brand stores and the auto mall. Environmentally progressive, tech-savvy, artistic and festive, this unique, vibrant and personality-rich area will delight each of your senses.

With a diverse citizenship ranging from seasoned legislator to street artist and everything in between, the South Sound, including Lewis and Mason counties is a truly unique and welcoming place to visit or call home. The population of the three counties is approximately 420,000, with the cost of living nearly 30% lower than the neighboring Seattle metropolitan area. (Housing costs are approximately 50% lower than Seattle's.)

The area is home to five institutions of higher learning. The Evergreen State College, St. Martin's University, South Puget Sound Community College, Centralia College and Olympic College. Whether you're looking for economic opportunity, cultural events or educational excellence, you'll find it—and much more—in the South Sound.

Mild winters and pleasantly warm summers make the area an ideal place for outdoor recreation. In Olympia, you can "get out of town" without even leaving the city. Olympia maintains 40 public parks for your recreation enjoyment. Public trails lead to saltwater beaches where native tribes once met for potlatches through woods thick with big-leaf maples and towering Douglas firs. Salmon return to Budd Inlet each fall and run the ladder under the 5th Avenue Bridge.

Olympia, Tumwater and Lacey's strategic geographic location along Interstate 5 puts one within two hours or less of incredible regional recreational attractions - from hiking and skiing in the mountains to beachcombing along ocean shores.



## TIMING AND APPLICATION

Applications that are received by **5:00 pm on Sunday, September 29, 2019** are assured full consideration. It is anticipated that final candidate interviews will be held the week of November 4, 2019.

To apply or view the current status of the position go to:

[www.hagelsearch.com/cfsps](http://www.hagelsearch.com/cfsps)

All submissions will be acknowledged and will be held in strict confidence. The starting date for the successful candidate will be subject to discussion between the candidate and the Community Foundation of South Puget Sound.

Finalists for the position will be required to participate in a behavioral assessment. The assessment is web-based, takes about 65 minutes, and helps match the candidate's attributes and competencies with the desired attributes and competencies for the position. All results are held strictly confidential. Formal background checks will be conducted on finalists for the position, with their permission.

### CONTACT INFORMATION

For further information please contact: Frank Hagel 253.693.2780 - [frank@hagel.net](mailto:frank@hagel.net) or Marcia Walker at 253.693.4072 - [marcia@hagel.net](mailto:marcia@hagel.net). DO NOT submit your application to these email addresses.



### EQUAL OPPORTUNITY

The Community Foundation of South Puget Sound is an equal opportunity employer. It is our policy to make all hiring and other employment decisions without regard to an individual's sex, race, national origin, religion, pregnancy, marital status, sexual orientation, ethnicity, age, or physical or mental disability.