

COMMUNITY FOUNDATION FOR THE TWIN TIERS (CFTT) POSITION DESCRIPTION

TITLE: Chief Executive Officer, President

EFFECTIVE DATE: December 8, 2022

EXEMPT/NONEXEMPT STATUS: Exempt

REPORTS TO: Board of Directors

SUPERVISES: Information Systems Coordinator, Program Officer, and Volunteers.

Service Area: Bradford, Potter, Sullivan, and Tioga Counties in PA and Tioga County, NY

JOB SUMMARY: The *Chief Executive Officer* is responsible for growing the impact and influence of the Foundation throughout the region it serves. The CEO mentors and supports the Foundation's staff while also providing leadership and support to the Board of Directors, Foundation advisory boards, area charities, and within the community at large. The top priority for the CEO is to expand and manage the Foundation's relationships with donors, professional advisors, affiliates, community leaders, and key nonprofit agencies throughout the region served by the Foundation with the goal of increasing the Foundation's philanthropic assets by linking people with the charitable needs and programs that matter most to them as well as with key community and regional priorities.

MINIMUM EMPLOYMENT REQUIREMENTS:

Knowledge, skills, and abilities: Demonstrated leadership ability and management skills to oversee the human relations and technical administration aspects of the community foundation. Exceptional listening as well as written and oral communications skills to build productive relationships with donors, professional advisors, volunteer leaders, charities and the community at large. Astute volunteer leadership skills to maximize the effectiveness of volunteer leaders and advisory boards. Strong organizational, planning, and multi-tasking skills. Demonstrated ability to work with all sectors of the community. High level of creativity to develop new approaches while solving a wide range of programmatic challenges and gift planning problems. Ability to understand and interpret financial reports, investment analyses, and other fiscally oriented materials. Knowledge of major and planned giving concepts and approaches to donor cultivation and stewardship. Sincere commitment to community service to make a difference in the life of a community. Ability to use computer-related software and technology to accomplish tasks.

Education: Bachelor's degree, with coursework in the areas of marketing, English/communications, business, finance, and other areas related to the work of a community foundation preferred. Advanced degree or professional certification in the field of financial planning, charitable gift planning, law, accountancy, trust services, etc. preferred. Professional education in fund-raising planned giving, donor relations, marketing, and/or related areas preferred. Over five years of comparable experience and training may be substituted.

Experience: Previous experience leading and managing a complex nonprofit entity or a comparable for-profit entity. Experience in engaging volunteer leadership and donors in advancing the mission of a nonprofit organization required. Experience with major gift fund-raising as well as donor cultivation and stewardship, or alternatively, experience developing high-net worth client relationships and new business capacity in a relevant for-profit field required.

Physical Demands and Working Conditions: Must be able to work in a variety of settings; must be willing to perform essential duties to be successful in this role. Position requires working irregular hours as needed and travel frequently throughout the multi-county region served by the Foundation; must have a vehicle for work-related travel.

Confidentiality: Will have access to confidential/sensitive information -- must maintain strict confidentiality. Must be a strategic communicator who is able to communicate the official voice and project the professional image of the Foundation.

MAJOR TASKS AND ESSENTIAL FUNCTIONS:

Administration and Governance (20%)

- Leads and supports the Board of Directors in developing, implementing, tracking, and revising the Foundation's strategic plan, policies, procedures, and goal setting to maximize the Foundation's effectiveness within the region. Ensure an optimum rate of financial and programmatic growth.
- Provides guidance and support to the Foundation's governance-related committees, namely the Board of Directors, County Advisory Boards, Nominations, Finance & Investment, and Audit committees to ensure goals are set and implemented and that appropriate policies and controls are in place.

- Provides leadership and support to staff to ensure that the operational needs of the Foundation are met. Encourages employee growth of their skills/talents, including supporting continuing education and training opportunities, with the goal of building a stable and motivated staff.
- Ensures that security measures are in place to safeguard computerized system for donor relations, grant-making, fund management, investment, and accounting & financial tracking needs of the Foundation.
- Pursues professional training and education opportunities to increase personal knowledge and skills in the areas of Leadership Development, community foundation management, estate and charitable gift planning, community service programming and grant-making and community development.

Relationship Building/Charitable Gift Development/Marketing/Community Capacity Building (20%)

- Identifies individuals, organizations, and foundations with the potential to provide philanthropic support to the Foundation, and executes plans to build relationships with each (e.g., personal visits, invitations to events, involvement in Foundation activities) with the goal of matching donor interests with community needs.
- Create and implement a resource development program specifically for annual support, major gifts and planned giving.
- Collaborate with the Board of Directors, advisory boards, and key staff to develop and cultivate current and potential donor relationships.
- Develops collaborative working relationships with estate planning professionals (e.g., attorneys, CPAs, financial planners, trust officers, realtors, and others), to support the Foundation growth plan (i.e. pursuing bequests, gift planning, etc.).
- Ensure the creation of printed marketing and donor and community relations materials to increase awareness of the Foundation’s mission, goals, accomplishments, and gift opportunities throughout the region served.
- Participates and seeks out opportunities to speak about the Foundation, its goals and accomplishments, and its gift opportunities via forums, service club meetings, media contacts, and other outlets to increase awareness of the Foundation.
- Helps charities relating to endowment building, major and planned gift development, and related areas.
- Participates on committees, task forces, and other collaborative community group endeavors to strengthen communication between the Foundation and the communities it serves.

Grant making and Due Diligence (30%)

- Ensures all ‘due diligence’ requirements associated with grant making and charitable distributions from funds are completed.
- Provides support and leadership to various county advisory boards, advisory & scholarship committees, and other coordinating bodies charged with identifying and making recommendations to the Board regarding potential agencies to receive grant/scholarship support from component funds.

Financial Management (30%)

- Provides direction and support to the Finance/Investment Committee.
- Prepares annual and project budgets, monitoring budgets to ensure appropriate spending, and ensuring accurate and timely reporting to the Board of Directors and Finance/Investment Committee.
- Develops and maintains collaborative working relationships with the Foundation’s Investment Consultant(s), custodian banks, investment managers, mutual fund representatives, the Finance/Investment Committee, and the Board of Directors to ensure the proper management and monitoring of investment performance and spending targets for all assets of the Foundation.

- Ensures that the Foundation’s annual audit is completed to regulatory standards. Including completion of all appropriate financial statements. The annual audit report is to be submitted to the board for timely review.
- Ensures appropriate ‘segregation of duties’ relating to the fiscal activities of the Foundation, including personal involvement in co-signing checks, approving expenditures and receipts, authorizing purchases, and spot-checking completed tasks of financial staff, and other duties appropriate to ensuring excellent internal accounting and financial controls.
- Ensures that all gifts are appropriately acknowledged, including processing and tracking gifts; thanking donors via personally and thank-you correspondence; recognizing gifts and donors consistent with each donor’s preferences; reporting to donors on the charitable impact of their gifts and the status of their funds; and related responsibilities to assure transparent accountability to the Foundation’s donors.
- Performs other duties commensurate with the role of a CEO as required or requested by the Foundation’s Board of Directors in overseeing the financial stability of the Foundation.

EQUIPMENT UTILIZED: Working knowledge of computers/basic office equipment; Proficiency in multiple software packages; Microsoft Word, Excel, PowerPoint, & Outlook; Adobe Photoshop or equivalent; Foundation based software Foundant or equivalent.

SCHEDULING: Varied work schedule, often requiring irregular work hours.

MANAGEMENT MAY REVISE DUTIES/SCHEDULES AT ANY TIME.

CEO: Suzanne Lee

DATE: December 8, 2022

CHAIR OF THE BOARD: Thomas Shoemaker

DATE: December 8, 2022

Approved: December 8, 2022

Revised: _____