Position Specification

United Way of Massachusetts Bay and Merrimack Valley

President and Chief Executive Officer

Private and Confidential
**Our Client**

United Way of Massachusetts Bay and Merrimack Valley (UWMB) is an independent 501(c)(3) non-profit organization whose mission is to reduce the obstacles preventing individuals from reaching their full potential. Focused on driving long-term systemic solutions that the community can embrace, the organization targets its efforts in the areas of child and youth development, housing, and workforce development.

UWMB is a locally governed and independently operated United Way – one of 1,400 across the country who together form a national movement to create sustainable systemic change with visible and measurable results. UWMB raises funds on an annual basis from a variety of sources across the community (including employee workplace campaigns, corporate and individual contributions, and government and foundation grants). UWMB currently evaluates, guides and invests over $45 million annually in a portfolio of over 150 community-based organizations. UWMB spearheads public policy initiatives tackling the most pressing community issues, making a direct and sustained difference in the lives of individuals. UWMB also mobilizes thousands of volunteers annually to address specific community needs. Specifically, UWMB directs its work and impact in four core focus areas:

- **Ending Homelessness:** On any given night in Massachusetts, more than 3,700 families are experiencing homelessness. That’s more than 13,000 individuals, 60% of whom are children. The effects of homelessness are devastating for families. Children without homes are twice as likely to repeat a grade, four times as likely to develop asthma and other health issues, and are at a 52% higher risk for developmental delays. Rising housing costs, mental health issues, substance misuse, and a host of other factors contribute to the increasing homelessness rate in our community. UWMB’s solution brings together non-profits that address each of these issues as part of the complex whole. They work with 77 strategic partner agencies in 142 communities to end family homelessness.

- **Moving Families out of Poverty:** Too many people in this region know what it’s like to be unemployed or work multiple jobs and still struggle to make ends meet. Too many neighbors have to decide between filling the fridge or filling a prescription. And too many people can’t find a job that pays well enough to face these challenges head on. For these families, a single setback is enough to be financially devastating. Climbing out of poverty is complex. UWMB provides leadership to a network of non-profits who serve families across our region. They help families in need set reachable goals such as cleaning up their credit so they can rent a home, sending a child to college, or getting a job that will pay a living wage. UWMB works with 51 strategic partners across 142 communities to move families out of poverty.

- **Supporting Young Children:** A child’s first five years of life are the most critical for brain development, but 33% of Massachusetts children enter kindergarten unprepared to learn. Many children lack important support that prepares them for school and academic success. Without it, these children can quickly fall behind and often never catch up. Unless they can read at grade level by third grade, they’re four times less likely to graduate from high school. In low-income neighborhoods, the youngest children are most vulnerable. The stresses of poverty during these critical years do tremendous harm to a growing brain. And children whose parents are unable to engage in their development can lag as much as six months behind in vocabulary development by age two. UWMB’s solution involves the whole family, allowing parents to work and their young children to grow and thrive. They work with 53 strategic partner agencies in 142 communities to support young children.
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- **Preparing Youth for Success**: Low-income youth in Massachusetts consistently score 25-30 points lower on reading and math assessments than those in higher income brackets. These gaps in academic performance and personal skill-building can be the start of a trajectory of lifelong challenges, leading to fewer economic opportunities and lower lifetime earnings than their wealthier peers. Despite one of the highest academic rankings in the nation, Massachusetts falls short when it comes to children from low-income neighborhoods. In addition to the academic achievement gaps, many under-funded schools lack the resources to focus on building social and emotional skills such as teamwork, problem solving, empathy, grit, and self-control. UWMB is working to help the more than 73,000 youth in Massachusetts, ages 16-24, who do not consistently attend school or work and are at greater risk of long-term poverty, incarceration, and substance misuse. Through out-of-school programs, 41,000 K-12 students will work toward social and emotional readiness, and 3,600 off-track kids will find a path toward college and a rewarding career. UWMB works with 117 strategic partner agencies in 142 communities to prepare youth for success.

Additionally, the Community Investment Tax Credit (CITC) offers a 50% state tax credit for gifts of $1000 or more, while fueling the work of more than 30 Community Development Corporations (CDCs) across the Commonwealth. Gifts can be made by individuals, businesses or foundations to help lift the communities in greatest need. Since the inception of the Community Investment Tax Credit (CITC) in 2014, United Way has served as the lead fundraiser and administrator of the initiative, raising more than $8 million from 500+ individual, corporate and foundation donors. As a result, over the past year, CDCs have built or preserved 1,535 homes, connected 56,283 families with housing-related services, created 4,305 jobs, provided 1,369 entrepreneurs with technical assistance, and mobilized 11,335 community volunteers.

UWMB works every day to improve lives in their service area of Eastern Massachusetts and Southeastern New Hampshire and Maine. They do it by mobilizing people, businesses, non-profits, and government agencies, neighborhood by neighborhood, town by town, city by city. It creates a ripple effect that can be felt across the region. Whether it’s a child in Boston learning to read, a family in Lowell saving enough to purchase their first home, or a teenager in Portsmouth making a film about prescription drug abuse, the lives of those UWMB touches are interlocked and interwoven.

UWMB has an annual operating budget of $45 million and a dedicated staff of approximately 100 FTE’s. The organization has an active and engaged Board of Directors, representative of local leaders across the public, private and philanthropic community. UWMB is part of United Way Worldwide, whose mission is to improve lives by mobilizing the caring power of communities around the world to advance the common good. UW Worldwide impacts 61 million lives each year.

To learn more about UWMB, please visit: [www.unitedwaymassbay.org](http://www.unitedwaymassbay.org)

**The Role**

The position of President and CEO is a very critical, high visibility position, not just for the organization, but also for the community. UWMB is in the middle of a transformation, moving from an organization that defined itself as a fundraiser and conduit for dollars, to a partner and leader across greater Boston’s business, non-profit and public sectors. The new President and CEO joins at a very important time for the organization. UWMB is adopting a more strategic and focused approach to its philanthropy in order to achieve greater impact in the community; adapting the workplace giving business model to new industry segments and the realities of today’s workplace; extending success growing its major donor base; and
undergoing a rebranding effort to better articulate UWMB’s value in the marketplace. The organization’s success requires a strong, dynamic organizational leader who embraces the mission and plan, and who will extend the impact of UWMB through his or her leadership in the community as a whole. The new President and CEO will play a critical role in shaping UWMB’s impact through refinement of its strategy and through focusing the strategy’s implementation.

Reporting to the Board of Directors, the President is also the Chief Executive Officer and has overall responsibility for the strategic, programmatic, financial, and management operations of the organization. The President and CEO is the leader in communicating the vision and program objectives to internal and external constituencies and will work collaboratively with the board, staff, and volunteers in formulating policy, developing strategy, raising funds, and achieving performance standards. Specific responsibilities will be best defined/measured in terms of the organization’s success in having more measurable impact within the areas it has targeted – child and youth development, housing and workforce development.

S/he must embrace the mission and be willing to be accountable for the success of UWMB’s community impact agenda. As such, the successful candidate will:

▪ Serve as the chief spokesperson and advocate for the organization’s mission, programs, and services. The President and CEO is expected to be active as a spokesperson for the needs of the community and quickly assume a “prominent player” role in the community;

▪ Refine, articulate and implement the organization’s strategic direction, working closely with the Board to establish priorities and evaluate the strengths and weaknesses of existing and new initiatives;

▪ Lead and play a key role in the relationship management and fundraising efforts of the organization, which include: cultivation and solicitation of support from foundations, corporations, individual donors and the government. Marketing UWMB’s “value added” to all constituents is especially important;

▪ Provide guidance and direction to the organization on all financial matters, operational and staff development issues. Modeling/mentoring/improving upon marketing/channel management activities so the UWMB “brand” is optimized will be a critical focus;

▪ Lead the efforts of UWMB in exploring linkages, partnerships, and collaborations with external organizations and groups, including its constituent agencies, other funders, and government in order to maximize the impact of the human services sector;

▪ Provide constant thoughtful leadership and promote a forum for creative and innovative ideas.

▪ Lead by example and promote a culture which champions diversity, equity, access, and inclusion at all levels.

**Candidate Profile**

UWMB is seeking a leader of unquestioned passion for good and bias towards action. The successful candidate will have a demonstrated capacity for leadership and should possess significant experience in environments of change and have a track record of accomplishment, credibility, respect, and recognition in those roles. S/he will bring to the role a recognized degree of operational excellence, fundraising ability,
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The President and CEO will have experience working closely with boards, staff, volunteers, and other constituents to articulate and achieve ambitious goals in a fiscally responsible manner. S/he should understand the respective roles of the Board, the President, and the staff, and possess the ability to recruit, motivate, delegate to, and retain exceptional people. S/he will have outstanding communication skills, both written and verbal, and the ability to represent UWMB effectively to diverse audiences. S/he must possess a high level of intelligence and intellectual curiosity, and a desire to explore new ideas and approaches to solving problems.

The successful candidate will listen to and learn from key stakeholders inside and outside the organization and embrace the value of the United Way network. S/he will have the capacity to build constructive dialogue and collaboration among people and across organizational structures, while honoring the history of, and respecting and promoting the culture and values of the organization. The successful candidate must understand the role of philanthropic agencies, be comfortable addressing community needs and concerns and have familiarity with public policy issues. The scope of the position is broad, requiring the President and CEO to have proven coalition building success which is necessary to establish and maintain significant relationships with persons at all levels within the public, private and voluntary sectors.

The ideal candidate will have the capacity to lead and manage change as UWMB manages its transition to a digital platform and navigates changing fundraising norms. S/he will also understand the process of gathering, harnessing, and leveraging data to drive donor activity.

Required personal qualities include: unquestioned integrity; a personal commitment to deliver the aforementioned community impact; a long-term perspective; authenticity; a strong sense of accountability and a practical ability to get things done; wisdom and good judgment; an even-handed steady approach to management combined with the flexibility and courage to shift directions and experiment; excellent oral and written communication skills; a high energy level; the ability to build bridges, plus the ability to project genuine warmth and compassion will all be required to assure success in this position. The successful candidate will be a culturally astute and broad-minded individual with a generosity of spirit and clear commitment to diversity, equity, access, and inclusion.

In terms of the performance and personal competencies required for the position, we would highlight the following:

- **Setting Strategy:** The successful candidate will have a demonstrated record of setting priorities, leading organizations through transition and evolution, as well as delivering results. S/he will be a transparent leader and strategic thinker who will work with UWMB's senior leadership team and Board to establish plans and methods to reach strategic objectives, build sustainability into existing programs, and develop a business model that allows the organization to realize its full potential and secures its fiscal viability for the long term. Working across a complex organizational structure, the President and CEO will build a positive and affirming work environment ensuring that the management, staffing and culture of the organization align with the mission and strategic ambitions.

- **Executing for Results:** The successful candidate will demonstrate the leadership necessary to be effective in an organization of highly motivated professionals, many of whom have worked together as a team for many years, and volunteers with a diverse set of skills and perspectives. S/he will foster a culture of engagement while convening and leading diverse constituencies from across the
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organization to achieve excellence. S/he will encourage transparency, openness and mutual respect while bringing multi-constituency sensitivity and demonstrated commitment to diversity and inclusion. The candidate will have the ability to set priorities, delegate responsibility, assure accountability, and allocate resources to ensure results.

▪ **Building Relationships and Using Influence:** S/he will be an inspiring and proficient communicator who can articulate the organization’s vision and impact to a wide and diverse audience as well as being authentic one-on-one. S/he will possess the ability to influence internally and externally through informed vision, political savvy and networking. S/he will manage a highly effective staff and recommend organizational structures that allow for the supervision and evaluation of quality execution while building unity and shared vision across teams. S/he will make the case for the growing need for donor support, redefine the role of United Way in the context of today, and appeal to the next generation.

▪ **Resource Development:** S/he will have the ability to connect with, influence, and secure funds from a wide range of constituents including government, corporate partners, donors, Board and staff. S/he will have a demonstrated ability to fundraise effectively and to recruit the leadership necessary to meet these goals.

▪ **Leading Teams:** The successful candidate will have the interpersonal skills and intellect needed to recruit, retain, motivate, and inspire professional staff, volunteers, current and prospective donors, and partners. S/he will be an active listener, demonstrate respect for others and, in turn, gain their respect. The candidate will be able to develop positive and productive relationships, creatively build consensus, and engage people and institutions towards achieving ambitious goals.

_Beyond meeting fully its legal obligations for non-discrimination, UWMB is committed to building a diverse and inclusive community where members from all backgrounds can live, learn and thrive._

**Contact**

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