

Position Profile

President & Chief Executive Officer

Benjamin Rose Institute on Aging

Cleveland, Ohio

The Organization:

Benjamin Rose Institute on Aging, a national leader in service, research and advocacy for older adults and caregivers, is a 501(c)3 nonprofit organization, founded in 1908 through the will of Cleveland industrialist Benjamin Rose. The organization's mission is to advance support for older adults and caregivers. Ranked among the largest nonprofits in the Northeast Ohio region, Benjamin Rose is governed by a 26-member all-female Board of Directors (as stipulated in Rose's will) and has a \$18+MM operating budget, substantial endowment and over 180 employees.

Benjamin Rose Institute on Aging ("BRIA") is a multi-faceted organization that provides a variety of programs and services that directly impact older adults and their caregivers in Northeast Ohio and as well as nationally. Benjamin Rose's work is accomplished by deepening the understanding of the evolving needs of older adults and caregivers in a changing society; developing and delivering innovative, high-quality solutions; and promoting effective public policies.

The following programs and subsidiaries operate together to fulfill Benjamin Rose's mission:

- ***Home- and Community-based services:*** Includes home care, adult day services, mental health day treatment, social work, behavioral health services and Senior Companions. Most services are delivered through Benjamin Rose subsidiary Eldercare Services Institute, LLC.
- ***Rose Centers for Aging Well:*** Promotes successful aging for Northeast Ohio's older adults by providing home-delivered meals, as well as hot lunches, programs and services at seven senior center locations.
- ***Empowering and Strengthening Ohio's People (ESOP):*** Helping adults in all stages of life achieve and maintain financial wellness and housing stability through HUD-approved housing and financial counseling and education, as well as benefits enrollment assistance.
- ***Margaret Wagner Apartments:*** Offers independent, supportive housing for low-income seniors.
- ***Center for Research and Education:*** Conducts applied aging studies that enhance the lives of older adults and the family members, friends, and professionals who care for them. Education and training programs disseminate the latest information about aging issues to older persons, caregivers and professionals.
- ***Community Advocacy:*** Identifies and influences public policies that impact older adults and their caregivers.
- ***Conference Center at Benjamin Rose:*** Includes meeting and event space ideal for lectures, seminars, corporate events, banquet meals, social gatherings and trade displays.

More information about the organization can be found on its website: www.benrose.org

The Position:

Location:

The President & Chief Executive Officer position is based at the Benjamin Rose Institute on Aging headquarters, 11890 Fairhill Road, Cleveland, Ohio 44120; telephone (216) 791-8000.

Reporting Relationships:

The President & Chief Executive Officer ("CEO") reports to the Chair of the 26-member all-female volunteer Board of Directors and is accountable to the full Board. The CEO's direct reports are Senior Vice President & Chief Financial Officer, Senior Vice President & Chief Operations Officer, Senior Vice President of Research & Education, Vice President of Strategic Development, Vice President of Institutional Advancement and Executive Assistant; indirect reports are Vice President & Executive Director for Rose Centers on Aging Well, Vice President of Advocacy & Executive Director of ESOP, Vice President of Human Resources & Corporate Compliance Officer; a total staff of 180.

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Other important relationships include: representatives of partner entities in the field of aging such as healthcare institutions, community-based organizations, government agencies, universities and research institutes; federal, state and local elected officials and their staffs; community leaders from business, and other nonprofit organizations and agencies; outside financial advisors, vendors and consultants; clients and their families.

Position Charter:

The President & Chief Executive Officer is responsible for managing and directing all aspects of the Benjamin Rose Institute on Aging and its subsidiaries. The CEO works under the direction of the Board of Directors of BRIA and collaborates with the Board, senior management and other agency staff on programs, projects and policies. This executive promotes and is responsible for an atmosphere conducive to innovation and creativity in the field of older adult services and applied research.

Major Duties and Responsibilities include:

- **Vision/Planning:** In coordination with Board committees and staff, shape the vision of Benjamin Rose, identifying organization needs and opportunities and prepare goals designed to meet those needs in conjunction with the Strategic Plan. The CEO is also responsible for ongoing evaluation of all Benjamin Rose programs, services and operations, with recommendations for changes and/or enhancements as needed, along with a system of measuring progress toward the attainment of short and long-range goals.
- **Resource Development:** Responsible for oversight as well as active engagement in all resource development efforts including grants, annual and multi-year development campaigns, government and foundations funding, private gifts, corporate donations and special events as well as sales and licensing of evidence-based programs and home and community based services. Set the vision and determine key funding priorities.
- **Advocacy:** Maintain ongoing relationships and communication with elected and other government officials, policy makers and influencers at all levels to provide information and advocate for effective health and social policy and on behalf of the Benjamin Rose's mission. Participate in local and national seminars, conferences, etc. to educate the public and professional entities about the challenges of the elderly population to advocate solutions for these challenges; this is to increase public and professional awareness about Benjamin Rose and its mission.
- **Communication:** Serve as a spokesperson for BRIA; communicate the organization's position on community, regional, public and political issues that affect the older adult population and caregivers in Northeast Ohio and nationally.
- **Fiscal Management:** In concert with the Board's Executive Committee and the Senior Vice President & Chief Financial Officer, develop BRIA budgets and relate them to program goals; maintain responsibility for all expenditures within framework of the budget. Ensure sound budgetary planning, including appropriate allocation of resources to each operating unit and to LLCs. Present monthly financial statements to the Board, ensure that financial records are audited annually and seek maximum staff efficiency in all financial procedures.
- **Liaison Roles:** Responsible for ongoing interaction and liaison with a wide constituency including:
 - Board of Directors:** Earn and maintain the respect and confidence of the BRIA Board. Serve as representative of the Board for all contacts with the staff, initiating programs for consideration by the Board, and advising the Board on all matters under consideration.
 - Aging Services Industry:** Serve on local, state and national committees and Boards formed to address the challenges of the older adult population and their caregivers.
 - Government Officials:** Maintain strong communication and relationship with elected officials and their staffs. Play a key role in advocacy on behalf of Benjamin Rose and in line with its objectives.
 - Regional Community/Relationships:** Develop and maintain personal contact with key community business and nonprofit leaders. The CEO will take a leadership role in local and regional issues, projects or community organizations to assure the presence and involvement of Benjamin Rose that are helpful in accomplishing its mission.
 - Funding Sources:** Maintain strong relationships with local and national funders, foundations, corporate sponsors and individual donors to educate funders about impact on services as well as engage new funding or resource development opportunities.
 - Educational Institutions:** Interaction with public and private higher education organizations in areas around gerontology including medicine, social work, behavioral health and research.
 - Media:** Serve as an official spokesperson of Benjamin Rose to the public at large and to the local and regional print and electronic media.

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- **Staff:** Responsible for employment, assignment of duties, supervision, training, periodic and annual evaluations and leadership of all staff. Assure consistency of HR policy development and implementation and ensure that staff members are prepared to successfully implement Benjamin Rose's program and services. Foster daily working environment that values teamwork and communication. Ensure staff participation in professional conferences, seminars and institutes as needed to develop and maintain operations at peak effectiveness.
- **Operations:** Responsible for the day-to-day operations and oversight of Benjamin Rose, to ensure that the organization is effectively managed. Recommend to the Board changes in structure and procedure as needed.
- **Volunteers:** Effectively recruit, motivate and inspire volunteers to creative and fruitful action. Work in concert with Board on key volunteer leader identification and training.
- **Facility Management:** Responsible for management of all Benjamin Rose properties with a goal of providing for an efficient operation and presenting an attractive "front door" to all who interact with the organization including clients, staff, the community and visitors.
- **Other Duties:** Perform other tasks and duties as may be assigned from time to time by the Board of Directors.

Travel:

The CEO is expected to attend local, regional and national conferences and meetings as well as engage with elected officials and their staffs in the Ohio state capital of Columbus and in Washington DC.

Compensation and Benefits:

The President & Chief Executive Officer is expected to earn an attractive compensation package; appropriate benefits and some relocation assistance will be provided.

The Candidate:

Education:

A Bachelor's degree is required and an advanced degree in Social Service, Business Administration, Gerontology, Nonprofit Management or a related field is strongly preferred.

Professional Qualifications:

The ideal candidate must have a proven track record of success with at least 10 years of experience and increasing responsibilities including several years at the senior leadership level. This career track may come from a variety of backgrounds such as: serving as the top executive within a progressive and comparably-sized elder services-focused public or private nonprofit organization; experience as a "#2" or other senior-level executive at a larger like enterprise as noted above; or an executive from another complex human services agency. Alternative experience could include private sector leadership experience with a background that demonstrates commitment to nonprofit organizations. Significant Board interaction and experience leading large staffs is strongly desired.

Knowledge, Skills, Abilities and Attributes:

- **Organization leadership:** 10+ years of strong administrative leadership of a complex human service organization.
- **Mission-focused:** demonstrated commitment to organization's mission supporting older adults and their caregivers.
- **Older adult services:** experience leading a complex organization that serves older adults and caregivers including background in service delivery and gerontological research.
- **Resource development:** experience with varied funding sources including government funders, grants, private donors, foundations and corporate philanthropy. Also includes experience with marketing products, services or programs for licensing and sales of programs and services.
- **Fiscal management:** experience in developing, managing, and dealing with budgets of at least \$5 million.
- **Management:** team-oriented management style focused on achieving results, continuous improvement, and performance excellence.
- **Planning:** experience successfully working with staff and Board to develop and implement strategic vision and tactical plans.
- **Board relationships:** significant involvement with Board of Directors and Board committees.

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- **Diversity:** experience working with diverse groups; promotes diversity programmatically.
- **External relationships:** developed effective relationships with local and national networks in public sector, nonprofit organizations, businesses and other provider organizations.
- **Community relationships:** active in other community-based organizations.
- **Negotiation:** able to effectively negotiate “win-win” solutions to issues and conflicts.
- **Business acumen:** ability and experience to understand and employ strong business principles and practices to the operations side of Benjamin Rose’s activities as well as financial management of the entire organization.
- **Facilities:** able to provide executive oversight in the management and upkeep of Benjamin Rose’s properties.

Desired personal traits:

- **Executive leadership:** possesses breadth, presence and ability to manage, influence and inspire others.
- **Mission:** able to embrace and champion Benjamin Rose’s mission.
- **Visionary:** can articulate vision to others at all levels of the organization and community.
- **Communication:** excellent oral and written communication and presentation skills; active listener.
- **Integrity:** possesses the highest personal ethical and moral standards.
- **Compassionate:** demonstrates a sincere desire to care and provide for those who are less fortunate; exhibits genuine support for older adults and their caregivers.
- **Interpersonal skills:** personable; can relate to people of diverse social, economic and cultural backgrounds; demonstrates emotional maturity.
- **Decision making:** demonstrates good judgment and firmness in decision-making; carefully assesses facts of a situation and weighs alternatives: able to make difficult decisions.
- **Innovation:** takes initiative; a proactive person who demonstrates leading edge thinking; open to evaluating and trying new ideas.
- **Collaborative:** demonstrates a willingness and ability to work with and through others; able to forge effective working relationships with various parties and encourage them to work together toward common goals.
- **Team player:** management style which supports and encourages the efforts of staff; demonstrates knowledge of and ability to manage group dynamics.
- **Organized:** able to manage multiple high priority tasks simultaneously.
- **Change agent:** anticipates need for change; develops and leads processes to facilitate and manage change.
- **Executive presence:** professional demeanor and style; tactful; gracious.
- **Learning agility:** ability to learn and adapt quickly; ability to apply past learning and experiences to create innovative solutions to new and more complex issues.
- **Initiative:** displays a passion for “getting the job done”; strong personal work ethic; “roll up the sleeves” attitude.
- **Credible:** able to build confidence, trust and, respect from staff, Board members, agency and community representatives.
- **Self-awareness:** displays high level of understanding self, open to feedback and uses it for self-improvement.
- **Resilience:** has positive outlook; able to handle setbacks, looks to create solutions rather than placing blame.

Challenges and Opportunity:

The projected first year accomplishments for the new President & Chief Executive Officer include:

- Establish presence at Benjamin Rose and in the broader Northeast Ohio community and make an immediate impact in this leadership role by keeping pace with ongoing matters and the daily demands of the position. Evaluate the organization and staff structure and lead efforts to recruit new executive team members based on expected planned retirements.
- Bring a fresh set of eyes to Benjamin Rose and its organization, structure and service offerings with the goal to fully realize BRIA’s mission. This includes integrated technology, team spirit and staff morale with elimination of any “siloeed” mentality across organizational programs. Develop a collaborative culture among Board and staff. Identify and remove barriers to cooperation.

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- Enhance Benjamin Rose’s presence and reputation in Northeast Ohio and nationally through collaborations, alliances and partnerships with other area healthcare, education, government and related organizations and institutions.
- Initiate formal and informal introductions and connections with BRIA’s donors and key stakeholders-- Board, staff, individual donors, corporate/foundations leaders, peer-leaders at like-organizations, Northeast Ohio nonprofit, healthcare, education and business leaders- - through varied communications and in-person meetings.
- Working with the Board, staff and other key constituents, begin the efforts to develop Benjamin Rose’s next multi-year strategic plan (2021-2025) complete with a business plan and appropriate metrics to achieve the plan.

The President & Chief Executive Officer position of Benjamin Rose is an outstanding opportunity for a multi-faceted leader who is mission driven but also appreciates the complex structure of BRIA and its programs and services. There is a perception that Benjamin Rose is more well known nationally than within its home region of Northeast Ohio, so the new CEO will have an opportunity to further develop the Benjamin Rose “brand” and understanding of the breadth and quality of services in this area. At the same time, as our nation’s population continues to age, the need for Benjamin Rose research, advocacy and service offerings is even more in demand. This person will play a highly visible public role, speaking on behalf of not only the Benjamin Rose organization but for all agencies and organizations that are involved in issues around the aging adult population and caregivers in Northeast Ohio and nationally.

Cleveland and Northeastern Ohio:

Cleveland, Ohio, is one of the nation’s most exciting metropolitan areas. The Greater Cleveland region includes residents from diverse ethnic backgrounds and has maintained a solid economy with a mix of service, healthcare, and manufacturing businesses. The area has long been recognized as a community with an outstanding “culture of philanthropy” with residents and the corporate community showing great generosity in supporting nonprofit organizations like Benjamin Rose.

Cleveland’s arts and culture include galleries, community festivals, restaurants, world-renowned orchestra, art museums and thriving theatre. The Benjamin Rose headquarters is located adjacent to University Circle, one of the most concentrated hubs of culture, health care and education in the country. On the shores of Lake Erie, the area is also home to beautiful parks and a myriad of recreational opportunities. Educational organizations include outstanding public and private school systems, community colleges and public and private institutions of higher learning. Professional and collegiate athletics include major league football, baseball, basketball, and collegiate Division I, II and III sports programs. For more information about living in Greater Cleveland: www.neorelocationguide.com

Contacts:

The client organization we represent, and WAVERLY PARTNERS firmly support the principle and philosophy of equal opportunity for all individuals, regardless of race, religion, sex, age, national origin or disability. Interested candidates should send a resume/CV to WAVERLY PARTNERS, the executive search firm retained by the Benjamin Rose Board:

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