

Rochester Area Foundation

PRESIDENT POSITION PROFILE



Rochester Area
Foundation

Rochester Area Foundation
12 Elton Hills Dr NW
Rochester, MN 55901

(507) 282-0203
wendy@rochesterarea.org
www.rochesterarea.org

How to Apply

Please submit your confidential cover letter, resume, salary history, and three references as well as any questions to:

Wendy Shannon
wendy@rochesterarea.org

Rochester Area Foundation
President Search Committee
12 Elton Hills Dr NW
Rochester, MN 55901

DEADLINE: March 17, 2017, 5:00 pm

References & Background Information

It is the Rochester Area Foundation's policy to complete an extensive background and reference check of candidates. Candidates are asked to provide a list of three references that should include, but not be limited to, a supervisor, a peer, and a subordinate, when applicable. The Rochester Area Foundation respects the issue of confidentiality and conducts the reference checks accordingly.

Candidates will be asked to sign an Authorization to Release Information for the purpose of a background check. The Rochester Area Foundation reserves the right to conduct additional testing and investigations at the discretion of the search committee.

Confidentiality & Equality Statement

We fully respect the need for confidentiality of information supplied by interested parties and assure them that their background and interest will not be discussed with anyone outside the search committee without their prior consent.

The Rochester Area Foundation firmly represents the principles and philosophy of equal opportunity for all individuals, regardless of race, gender, sexual orientation, age, creed, disability, or national origin.

To learn more about the Rochester Area Foundation, visit:

www.rochesterarea.org

Vision & Mission

VISION

Better communities for all.

MISSION

Build and enhance the quality of life for all in the greater Rochester area through philanthropic leadership and community partnerships.

VALUES

Our core values provide the basis of how we serve. These core values are:

- **Integrity**

We work to earn the trust of those we serve by operating ethically with honesty, openness and respect in all aspects of our work.

- **Collaboration**

We believe in the synergy of partnerships, combining resources for community benefit.

- **Inclusion**

We value persons from all walks of life and seek broad community involvement.

- **Innovation**

We demonstrate and welcome creativity, resourcefulness and ingenuity for achieving community good.

- **Stewardship**

We take seriously the fiduciary responsibility of safeguarding and growing the philanthropic assets and resources entrusted to us.

Rochester Area Foundation Organizational Background

The Rochester Area Foundation (RAF) was the vision of Mr. Harry Harwick, a longtime chief administrator at Mayo Clinic. He and his contemporaries established RAF in 1944 to make a positive impact in the Rochester area and assist those in need. The original funds of the Foundation were derived from a grant of \$3,500 from Mayo Clinic. From the beginning RAF has been helping people make a difference in the quality of life in the greater Rochester area and beyond.



Philanthropic Leadership

We offer donors and fundholders flexible, high-impact vehicles for giving.

- **WE'RE UNIQUE**
You don't give to us, you give through us
- **WE'RE FLEXIBLE**
We offer many different types of funds and vehicles with various tax advantages, and accept assets in many forms
- **WE HARNESS COLLECTIVE GENEROSITY**
We encourage community members to pool their resources for maximum impact and return



Grantmaking

We provide major funding for nonprofits and students through grantmaking and scholarships.

- **SCHOLARSHIP FUNDS**
We support students – from preschoolers to graduate students – in their educational journey
- **GRANTS SUPPORT NONPROFITS**
Every year, RAF gives out approximately \$2 million in grants to area nonprofits of all types
- **ALL NONPROFITS ARE ELIGIBLE**
RAF's program experts evaluate all aspects of community wellbeing – arts and culture, economic development, education, environment, health and human services, neighborhood revitalization and more.



Community Initiatives

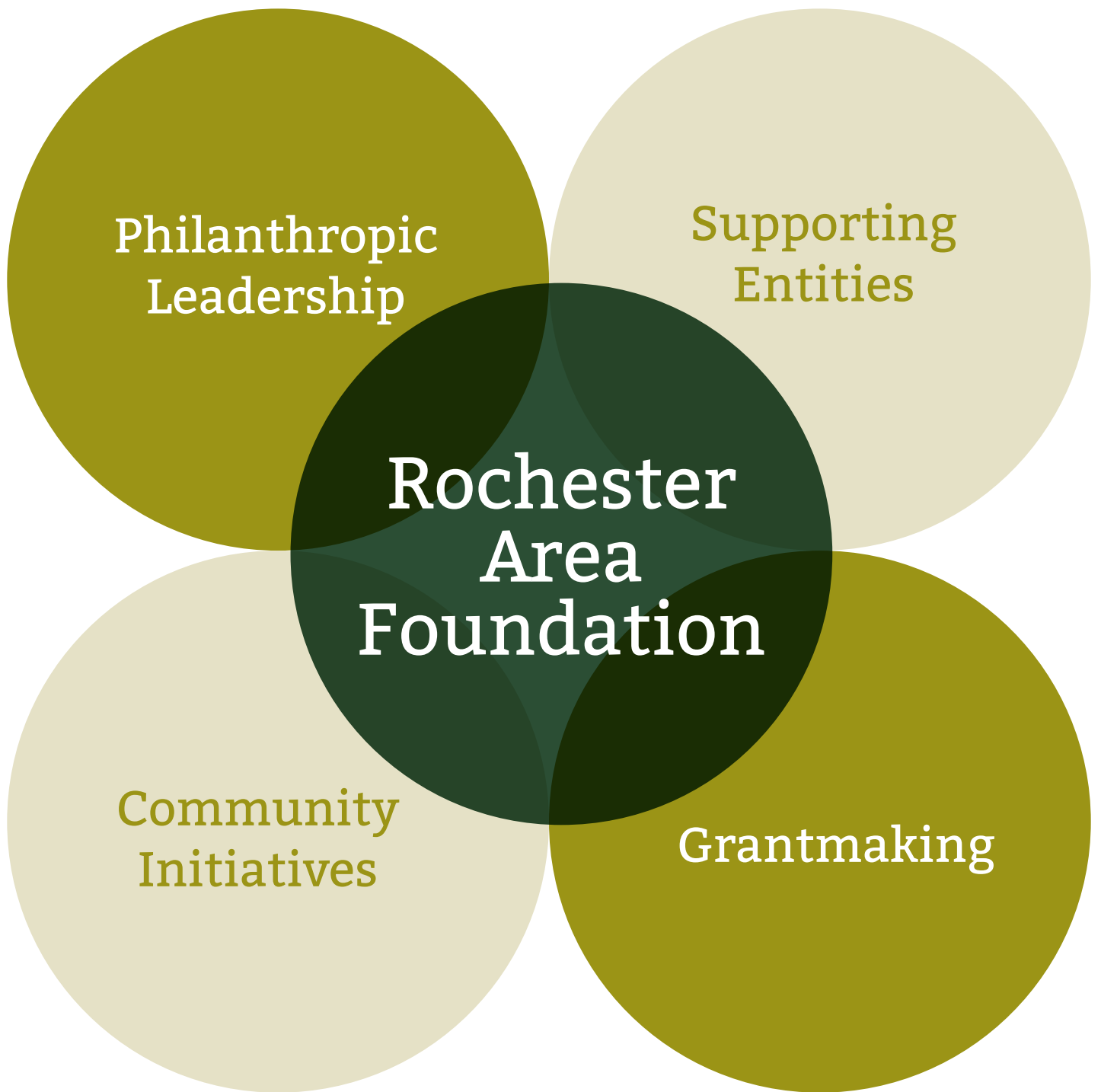
We bring people together and provide leadership around key community issues.

- **WE CONVENE COMMUNITY LEADERS**
To make progress on big-picture issues, the community needs a neutral entity bringing people together around the table
- **WE'VE PROVEN OURSELVES**
RAF has successfully worked on multiple issues – Affordable Housing, Early Childhood Education, Community Gardens
- **CURRENTLY WORKING ON**
Workforce-Priced Housing in Olmsted County

\$4 million
endowment

Better Communities Fund

- We are caretakers of the community endowment, which is called the Better Communities Fund
- Giving to the Better Communities Fund helps the Foundation continue our programming and grows the endowment
- Unrestricted Gifts empower us to make strategic grants where the need and opportunity are greatest



Supporting Entities - In addition to Rochester Area Foundation's many philanthropic programs and initiatives, we have two supporting organizations. Both of these entities support the Rochester Area Foundation's mission, though with individual business models and Boards of Directors.

First Homes

A workforce housing initiative begun in 1999 to create starter homes for income-qualified working families, managed by our in-house realtor. While the initial goal was 875 units (500 single family and 375 rental units), today the program supports over 1,100 single family homes, of which 210 are in the Community Land Trust to retain affordability into perpetuity. It is of note that over 1,500 families have been served by the First Homes program.

Impact Finance

A Community Development Financial Institution, CDFIs are private, mission-driven organizations that pair federal resources and private funding to provide alternative and reliable access to capital investments for small businesses and critical community development project to spark job growth and retention in underserved communities. Funding through Impact Finance supports small businesses, microenterprises, nonprofit organizations, commercial real estate, and affordable housing.



Duties & Responsibilities of the President

Position

Reporting to the Board of Trustees, the President will have overall strategic and operational responsibility for Rochester Area Foundation's staff, programs, expansion and execution of its mission. The President will continually develop deep knowledge of field, core programs, operations, and business plans.

Responsibilities

Leadership and Management

- Ensure ongoing programmatic excellence, rigorous program evaluation and consistent quality of finance and administration, fundraising, communications, and support systems; recommend timelines and resources needed to achieve the strategic goals.
- Actively engage and energize Rochester Area Foundation staff, Trustee members, donors, committees, private and nonprofit partnering organizations, and funders.
- Develop and maintain relationships within the local community and the regional service area. The Foundation will be recognized by key constituencies and local leaders as a partner in efforts to make our greater community exemplary.
- Serve as the public face of the Rochester Area Foundation, and be a prominent presence in community initiative and gatherings.
- Lead, coach, develop, inspire, and retain Rochester Area Foundation high-performance staff.
- Develop and foster a productive, collaborative, team-oriented, inclusive, and positive work environment.
- Ensure effective systems to track progress, and regularly evaluate program components, so as to measure successes effectively communicating outcomes to the board of trustees, funders, community leaders, and other stakeholders.

Fundraising and Communications

- Expand revenue generating and fundraising activities to support existing program operation on balance with retiring building debt.
- Deepen and refine all aspects of communication—enhance web presence, media relations, assure cyclic revision of printed materials to broad based external relations with the goal of creating and managing a strong brand.
- Use external presence of Executive leadership and staff to foster strategic relationships to garner new opportunities.
- Work to sustain recognition of Rochester Area Foundation as an outstanding model of philanthropy on a state, local, and national level.

Working Closely with the Board of Trustees

- Ensure that the Board is informed in a timely manner regarding significant issues, events, contracts which exceed \$5000, opportunities and challenges relating to the Foundation and implementation of the mission.
- Ensure that the Chair of the Board and Board committees receive requested information and administrative support to develop meeting agendas and conduct productive and efficient meetings.

Create and Manage a Successful Comprehensive Development Plan

- Encourage and facilitate philanthropy among a broad base of participants, striving for inclusiveness and collaborative efforts to meet larger and ever changing community needs.
- Work closely with the Philanthropy Officer to effectively reach out to current and prospect major donors cultivating and developing their philanthropic interests with direct ask campaigns.
- Establish and support a clear Asset Development Plan to ensure that RAF has sufficient assets to support Foundation goals and organizational sustainability.

Qualifications of the President

The President must be thoroughly committed to Rochester Area Foundation's mission. All candidates should have proven leadership, coaching and relationship management experience. Concrete demonstrable experience and other qualifications include:

- Advanced degree, ideally an MBA, with at least 10 years of senior management experience preferably in a philanthropic Foundation or a Foundation related field.
- Track record of effectively leading and inspiring an outcomes-based organization and staff.
- Ability to point to specific examples of having developed and operationalized strategies that have taken an organization to the next stage of growth.
- Unwavering commitment to quality programs and data-driven program evaluation.
- Excellence in organization management with the ability to coach staff, manage and develop a high-performance team, set and achieve strategic objectives, and manage a budget.
- Past success working with a board of trustees with the ability to cultivate existing board member relationships and help identify new potential nominees with needed skill sets.
- Strong marketing, public relations, and fundraising experience with the ability to engage a wide range of stakeholders and collaborative partnerships.
- Strong written and verbal communication skills.
- Ability to work in an environment with competing priorities that can lead to sustained ambiguity.
- Ability to work effectively in collaboration with and foster confidence in diverse groups of people.
- Exhibit passion, integrity, positive attitude, be mission-driven and self-directed.
- Strong financial skills, budget formulations and management, familiarity with a wide range of financial instruments and transactions.





Employee Benefits Summary

The Rochester Area Foundation offers a robust benefit package, individual components of which may be negotiable following the establishment of mutual interest between the Rochester Area Foundation and the candidate.

SALARY

Salary is commensurate with experience. The Rochester Area Foundation strives to provide compensation at market rates when compared to like organizations.

INSURANCE

The Rochester Area Foundation will pay 80% of single coverage of health insurance premium each month, and 60% of dependent premiums. Life insurance and long-term disability insurance is paid 100% by the Rochester Area Foundation.

HOLIDAYS

There are nine paid holidays for full-time employees during year, which include New Year's Day, Martin Luther King, Jr. Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, the day after Thanksgiving Day, Christmas Eve, and Christmas Day.

PTO

The Rochester Area Foundation does not separate vacation and sick time. Instead, employees will accrue PTO based on hours worked within each pay period. PTO benefits for the President are negotiated with the Search Committee.

Retirement Plan

Rochester Area Foundation provides a retirement program. You may contribute to the retirement plan after 90 days of employment. The money you put into the account is immediately vested and goes with you when you leave the organization.

In addition, Rochester Area Foundation contributes to employee retirement plans by way of a Simplified Employee Pension (SEP) plan. When the employee becomes vested after one year of employment, the employer contribution of 5% into the SEP Plan also goes with you in the event you leave the organization.

403b retirement plans are available to eligible employees.

Additional Benefits provided to the President:

- Credit card for Rochester Area Foundation expenses
- Expense reimbursement applicable to the work of the Rochester Area Foundation
- Health Savings Account



Rochester Area Foundation

Board of Directors

Wendy Shannon

Director, Graduate Induction Program, Winona State University, RAF Board Chair

Mark Utz

Attorney, Wendland Utz, RAF Board Vice Chair

Greg Layton

US Bank, Market President, RAF Board Vice Chair

Barbara Jordan

Mayo Medical School, RAF Board Secretary

Brad Schmidt

Mayo Clinic Rochester CFO (retired), RAF Board Treasurer

Hugh Smith

Mayo Clinic Rochester President (retired), RAF Board Past Chair

Jose Rivas

President, CRW Architecture & Design Group

Vivien Williams

Independent Journalist/ Filmmaker

Denise Kelly

US Bank, Vice President and Managing Director, Private Client Group

Walt Ling

IBM Senior State Executive, Minnesota and Senior Site Executive, Rochester (retired)

Paul Gorman

Co-Chief Investment Officer & Assistant Treasurer, Mayo Clinic

Mary Ehmke

CEO, KMTelcom

Don Supalla

Former President, RCTC (retired)

Larry Koshire (2017)

General Manager, Rochester Public Utilities (retired)

Steve Spohn (2017)

SVP, General Counsel, Think Mutual Bank

Kathryn Lombardo (2017)

President, Olmsted Medical Center

Lisa Clarke (2017)

Executive Director, Destination Medical Center Economic Development Agency

Rochester, Minnesota Area Overview

Things that are rare in other parts of the world are not rare in Rochester. Ranked No. 1 on Livability.com's Top 100 Best Places to Live, Rochester is home to the Mayo Clinic, the world's first and largest not-for-profit group medical practice and the city's top employer.

In part because of the talent and guests the Mayo Clinic attracts from all over the world, the city has more arts organizations and cultural events than one might expect for a city its size.

Residents here enjoy world-class education, hospitality and abundant natural beauty.

Rochester is passionate, international and urban, yet has the strong sense of community you'd find in a small town.

Mayor Ardell Brede concedes that "the winters are tough," but perhaps that leads to even more enjoyment of the nice weather in summer. He takes advantage of the bike paths in town and says the city draws as many as 20,000 for its Down by the Riverside free outdoor concerts.

WHY ROCHESTER?

The foundation of this community is built on innovation, talent, and welcoming places.

Innovation creates an environment that continues to attract small businesses and helps them grow.

Talent recruitment provides fuel for businesses across diverse industries to become world-class.

Place projects create vibrant centers of interaction and inspiration fostering business collaborations and personal connections.



Distance to three major cities nearby:

Minneapolis, MN: 85 miles

Madison, WI: 210 miles

Des Moines, IA: 210 miles

Median
Home Price
\$178,500

Unemployment
Rate
3.2%

We serve more than Rochester, stretching out to a 30-mile radius. Our area includes 5 surrounding counties and thousands more citizens in the greater Rochester area.



Population
151,436
Olmsted County

Population
has grown 31%
since 2000

Percent of
persons age 25+
with a high school
degree or higher,
93%



Rochester Area Foundation

