



**United Way
California Capital Region**

Position Fact Sheet

**United Way
California Capital Region**

**President and
Chief Executive Officer**

Sacramento, CA

July 2, 2021



Celebrating over 42 years of excellence; 1979 – 2021

This Position Fact Sheet is intended to provide information about United Way California Capital Region (UWCCR) and the position of President and Chief Executive Officer. It is designed to assist qualified individuals in assessing their interest.



ORGANIZATIONAL OVERVIEW

“United Way California Capital Region has been serving our five-county region for nearly 100 years to build stronger, healthier, and more compassionate communities. We are dedicated to improving the lives of families and children, and strengthening communities in Amador, El Dorado, Placer, Sacramento, and Yolo counties.”

Our client, United Way California Capital Region (UWCCR) [yourlocalunitedway.org], is seeking a dynamic new President and Chief Executive Officer. This individual will replace Stephanie McLemore Bray, who left UWCCR after seven very productive years, to join Seattle Foundation as its Chief Engagement Officer. At the end of 2020, UWCCR received a “game changer” donation of \$10 million from philanthropist MacKenzie Scott. The new President and CEO is coming into a well-resourced organization, one that is seeking new leadership to leverage this incredible gift.

United Way California Capital Region is an independent local affiliate of United Way Worldwide with a local board of directors. United Way Worldwide is an international movement of nearly 1,800 community-based United Ways in 40 countries. It advances the common good by focusing on education, income, and health – the building blocks for a good quality life. The United Way movement mobilizes millions to action – to give, advocate and volunteer – to improve conditions in their local community.

Founded nearly 100 years ago to improve people’s lives and build stronger communities in the capital area, UWCCR continues to be a backbone in the community, serving as a leader amongst nonprofits. It serves a five-county region -- Amador, El Dorado, Placer, Sacramento, and Yolo -- with a total population of nearly 2.4 million people. The mission of UWCCR is to improve people’s lives in the region by mobilizing and integrating resources.

The current work has UWCCR spearheading regional relief efforts during the pandemic. In the early months, the organization raised \$572,000 to provide 1,145 families with \$500 to offset costs of rent, bills and basic needs. The organization is also working with the city of Sacramento on a digital equity program to provide free broadband access to up to 10,000 low-income Sacramento households, plus free computers and digital literacy training for another thousand households. UWCCR also continues their The Square One Project, launched in 2016. Square One is a 20-year promise to significantly increase the number of local students who graduate



from high school, ready for success in college or career. Ending poor health, high unemployment, racial inequality and poverty starts in school. School is “square one” for reaching all families and ensuring children are healthy and successful.

Importantly, our United Way shares the community’s feelings of sadness and outrage toward racial violence and injustice. We are committed to building stronger, healthier and more compassionate communities and channeling our justifiable outrage to collaborative action, and we are seeking new leadership to do just that.

POSITION SUMMARY

The President and CEO reports to an engaged, dedicated, and high energy 25-member Board of Directors, comprised of regional community members and business leaders. The position oversees 39 staff members, an operating budget of approximately \$7 million, assets of \$19 million, and is projected to raise \$9 million in the current budget cycle. In 2018-19, UWCCR generated nearly \$13 million in resources for the communities it serves.

As the leader of the organization, the President and CEO establishes a vision for community impact in the five-county region. The President and CEO is the chief mobilizer, leveraging the power of relationships and networks to engage private, public, and corporate sectors to improve communities in our region. The President and CEO is the steward of the brand and understands his/her/their position’s role in growing and protecting the reputation of United Way California Capital Region, building trust, and clearly establishing the relevance of United Way in the community.

The President and CEO’s primary responsibilities include:

- Partner with the Board to craft and adapt the strategy to achieve increased community impact and thereby build the core business.
- Establish and build relationships with leaders in the community including those representing the top levels in the business, government, and non-profit sectors.
- Drive key results in fundraising and promote a culture of philanthropy in the organization, both at the staff and board level.



- Serve as the principal resource to the Board of Directors and its key committees and give strong direction in policy formulation and interpretation.
- Partner with the Board of Directors and staff to craft organizational goals and develop strategies to ensure that they are achieved.
- Ensure coordination and alignment of all United Way activities and resources towards achieving the goals.
- Build and lead a high-performing team, ensuring team alignment, and collaboration to achieve organizational results.
- Oversee the operational and fiscal integrity of the organization, managing within policies set by the Board of Directors.
- Assess organizational capacity to implement strategies and identify gaps in systems and staffing while managing organizational spending, budget compliance, and financial risks.
- Ensure that United Way California Capital Region demonstrates the importance of inclusiveness and diversity among staff and volunteers.

This is a wonderful opportunity to play a key role in taking a well-resourced, highly respected agency into its “next chapter.” The ideal candidate will be a visionary leader who will work with other community stakeholders to grow UWCCR’s presence as the leading nonprofit in the region.

EXPECTED OUTCOMES FOR THE FIRST YEAR

It is expected that the President/Chief Executive Officer will achieve the following by the end of the first year (in implementation order):

- Within the first 90 days...
 - In conjunction with the Board Chair and Executive Committee, will have:
 - met with UWCCR executive staff and other employees to begin building relationships and understanding the high-priority activities and key dates already in flight.
 - identified and met with an agreed upon “top 10%” of major stakeholders (board members, committee chairs, other nonprofits, community leaders, unions, and business community) to begin establishing relationships.



- will have gained an understanding of the Board’s priorities and the current “state of the business” and conducted an internal and external SWOT assessment (Strengths, Weaknesses, Opportunities, and Threats).
- will have assessed the current five-year strategic plan.
- Within the first 180 days...
 - will have met with the balance of the noted stakeholders and, as appropriate, commenced ongoing communication and continued relationship building.
 - in support of the strategic plan, will have assessed the current fundraising structure and strategy and elevated it to support the dynamic level of fundraising required to fulfill the mission.
 - with the Board’s support, will have made value-added changes and plans to execute in support of creating “UWCCR 2.0,” addressing the issues in the five-county region.
 - in support of the strategic plan, will have evaluated current roles (including possibly adding a COO), aligned responsibilities, and created development plans to support and retain valued staff.
 - will have established effective and transparent financial internal controls and record keeping.
 - will be inviting and have been invited to the table for significant regional initiatives.
 - Will have assessed the tools (e.g., technology) needed for ongoing operations in support of the strategic plan.
- By the end of the first year of employment...
 - as defined by the metrics, will be successfully implementing the strategic plan.

PROFESSIONAL EXPERIENCE

Successful candidates will have the following professional experience that will allow them to achieve the outcomes noted above (in priority order):



- Demonstrated ability to manage multi-million-dollar budgets (Internal)
- Senior-level leadership with supervisory responsibility of multiple direct reports (Internal)
- Significant fundraising and campaign experience with proven record of successfully cultivating, soliciting, and securing major gifts and grants (External)
- Experience in successful coalition building to achieve strategic aims (External)
- Experience in working with a board. Could be as a board member (Internal)
- Experience partnering with non-profit service organizations (External)
- Experience in advocacy, government affairs, and public relations (External)
- A track record of a focus on staff development and experience in building a positive workplace culture (Internal)
- A track record of a significant, dedicated, intentional focus on diversity, equity, and inclusion, demonstrated by involvement in programs and initiatives (Internal/External)



PROFESSIONAL COMPETENCIES

Successful candidates will have the following competencies that will allow them to achieve the outcomes noted above (in priority order):

- Financial management
- Ability to raise funds for mission-related causes
- Future focused/visionary
- Exceptional communication skills, oral and written
- Servant leader
- Ability to develop strategic alliances and collaborate with other leaders
- High level of self-awareness and emotional intelligence
- Ability to effectively relate to people at all levels, internally and externally

EDUCATION/CREDENTIALS

Successful candidates will have the following education and credentials that will allow them to achieve the outcomes noted above:

- Undergraduate degree required
- History of ongoing self-education

VALUES / WORK CULTURE

The ideal candidate will possess values, a work style, personal traits, attributes, and characteristics that will create an excellent fit with the organization's culture and structure (in priority order):

- Integrity and trustworthiness
- Passion for our mission
- We dream BIG! Visionary
- The highest level of customer service, internal and external
- Equity and inclusion
- Forward-thinking
- Heart
- Transparent



THE COMMUNITY

This position is located in the Sacramento Region which includes the five counties of *Amador, El Dorado, Placer, Sacramento, and Yolo*. The largest metropolitan area is Sacramento, the capital of California.

The city of Sacramento is the cultural and economic center of the Sacramento metropolitan area, the fourth largest city in California and the 25th largest in the U.S. Local universities include California State University, the University of the Pacific's McGeorge School of Law, and the University of California, in nearby Davis. The UC Davis Medical Center, a world-renowned research hospital, is one of 19 hospitals in the Sacramento region.

The Sacramento region is experiencing a profound shift in its competitive position, in large part due to an influx of entrepreneurs, businesses, creative professionals, and remote workers looking to escape costly urban living. The Greater Sacramento Area is a top employer in life sciences and health services. As part of the agriculturally rich Central Valley, Sacramento is at the forefront of agritech innovation and is considered America's Farm-to-Fork capital.

Sacramento is also home to the NBA Sacramento Kings, the Sacramento River Cats (the San Francisco Giant's AAA baseball team), and the Sacramento Republic FC, a USL Professional soccer team. The Golden 1 Center, a high-tech basketball and entertainment arena and the new home of the Kings, opened in 2016, starting a downtown renaissance.

The Crocker Art Museum is one of the leading art museums in California. Plans are underway for the development of an adjacent park into a public, art-focused gathering place. The Sacramento metropolitan area boasts more than 200 parks, four public golf courses, and is known for outdoor recreation including hiking, skiing, canoeing, kayaking, running, and biking.

The world-renowned Napa Valley is an hour's drive away. San Francisco, Lake Tahoe, and more than a dozen ski resorts are less than a two-hour drive from Sacramento. Sacramento International Airport handles non-stop flights to and from more than thirty-two U.S. destinations (including Hawaii), as well as Canada and Mexico.



For more information, visit the Greater Sacramento Economic Council's website www.selectsacramento.com.

COMPENSATION AND INTERVIEW PROCESS

The competitive compensation package includes a salary of \$200,000 plus a results-based bonus of up to 10%, based on meeting the above noted expectations. The position is also eligible for employer-paid health insurance and a 401(k) retirement plan.

Pre-screened, selected candidates will be invited for an initial interview in Sacramento, CA, with the Search Committee, on Monday, September 13, 2021, with second interviews the following morning.

PROCEDURE FOR CANDIDACY

For confidential consideration, at your earliest convenience and no later than COB on August 13, 2021, please email your chronological resume (to include description and size of current/prior organizations and responsibilities) and compensation expectations to:

UnitedWay-CEO@wilcoxcareer.com

We strongly encourage and welcome applications from all qualified persons regardless of their race, sex, gender identity and expression, disability, religion/belief, sexual orientation, or age.

WILCOX MILLER & NELSON CONTACT

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