

## LEADERSHIP PROFILE



### Chief Financial & Administrative Officer (CFO) The Trustees of Reservations Boston, MA

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“Preserve, for public use and enjoyment, properties of exceptional scenic, historic, and ecological value in Massachusetts.”

*The Trustees Mission*

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### A COMPELLING OPPORTUNITY



**The Trustees is the largest conservation and preservation organization in Massachusetts.** With an annual budget of \$35 million and 10% annual growth, The Trustees is fast-moving, complex and impactful. The organization is ambitious and trend-setting in the way it protects, activates and enlivens places of statewide significance for public benefit.

**The Trustees owns and cares for 116 unique and iconic properties** for public use and enjoyment. With 125,000+ members and a 126-year history, the organization has an ambitious vision and strategic plan. It has an impressive, engaged Board of Directors and an innovative, forward looking CEO and Executive Team.

**The Trustees has a very diverse funding base.** Membership dues, philanthropic contributions, admission fees at properties, earned enterprise revenues and endowment income are the major funding sources. Complex M&A activity is part of ongoing organizational strategy and innovation.

**The new Chief Financial & Administrative Officer (CFO) will be a creative, well-rounded leader** and manager of financial, administrative and business assets for a growing, complex nonprofit. The CFO will be a valued strategic partner for the CEO, Executive Team and Board, and will provide vision and management of finance and other cross-cutting functions including IT, risk management, human resources, data analysis and legal.

## THE ORGANIZATION



**The Trustees is an organization with a rich history and an exciting future.** For more than a century, the Trustees has worked in and with communities across the state of Massachusetts, preserving, enhancing and sharing special places.

The Trustees' origins trace back to 1891, and it was the first private non-profit conservation organization of its kind in the country. Today, the organization is at the forefront of defining conservation in the 21<sup>st</sup> century, with an expanding profile in and beyond New England.

Headquartered in Boston, The Trustees is recognized as an innovator in protecting the distinctive character of communities and inspiring commitment to special places of exceptional scenic, historic, and ecological value.

**The Trustees protects and activates for public benefit** a diverse range of historic houses and structures; gardens, gorges, waterfalls and woodlands; working landscapes including the nation's oldest farm, Appleton Farms; early industrial sites; and beaches including Crane Beach in Ipswich and Great Point on Nantucket. Among these treasured places are six National Historic Landmarks, six structures on the National Registry of Historic Places, and an array of other local and national archaeological and historic landmarks.

The Trustees is the largest private owner of coastline (protecting 125 miles) and farmland in the state, including more than 12,000 acres of designated Core Habitats, 396 buildings and over 270 miles of trails. The organization employs over 200 year round and 400 seasonal staff at 100 locations across Massachusetts.

### **The Trustees' ambitious Strategic Plan 2023 focuses on five directions:**

- Protect the places people love
- Effectively respond to a changing coast
- Ignite our cultural and agricultural experiences
- Invite the next generation outside
- Build The Trustees of the future



For more about The Trustees, go to [www.thetrustees.org](http://www.thetrustees.org).

## THE RESPONSIBILITIES

**The Chief Financial & Administrative Officer (CFO) will be a savvy, proven leader and manager with passion for The Trustees' mission.** The CFO will lead financial, administrative and business management including finance, IT, risk management, human resources, data analysis and legal, managing a cross-functional team of 15.



The Chief Financial & Administrative Officer (CFO) will:

1. **Be a visionary CFO for this complex, ambitious organization.** The CFO will be a leader of people, ideas and business functions. The CFO will be a partner for the CEO, Executive Team and Board on strategic financial, administrative and strategic aspects of the work. The CFO will fully embrace the organization's mission and ambitions, and will contribute in significant ways to the Trustees' growth, innovation, culture and accomplishments.
2. **Provide financial acumen and management.** The CFO will have broad-gauge experience and management skills related to financial and accounting systems, cash forecasting, audits, real estate, the fleet and related issues and contracts, as well as diverse, complex funding streams and investments.
3. **Lead technology transformation.** The CFO will have experience and/or involvement with broad-based IT implementation. The CFO's team will lead a successful Trustees system transformation in the next few years.
4. **Develop a systematic approach to risk management.** As the organization continues to expand, the CFO will tackle risk management planning and oversight of legal and compliance issues.
5. **Advance human capital and culture.** The Trustees' culture is collaborative, fast-paced and oriented to growth and innovation. The CFO will provide strategic leadership of the mission-critical human resource function and team. The CFO will thrive in, and foster, a culture that is positive, collaborative and functionally integrated.
6. **Manage a high-performing team.** The CFO will be an engaged, enthusiastic manager of individuals and teams who fosters collaboration and cross-disciplinary engagement. The CFO will enjoy coaching, managing and team building and be an experienced grower of accountable, high-performing teams with high job satisfaction.

Ideally, the CFO will bring relevant corporate and nonprofit experience that includes management of teams in relevant organizational contexts:

- Complex, diverse multi-site and multi revenue-stream.
- Complex budgets, multi-year and annual planning.
- Technology implementation.
- Risk management.
- Robust, data-driven planning and analysis.
- Management of investments, insurance, risk, legal and compliance, real estate and fleet acquisition, maintenance and renovation.

## PERSONAL CHARACTERISTICS

**The ideal candidate is a compelling, strategic leader and manager of financial and administrative teams and progress.** Passion for the Trustees' mission is essential. Personal characteristics being sought include:

- An authentic leadership style that inspires others, welcomes ideas and inspires collaboration.
- A growth-oriented, ambitious mindset.
- Intellectual curiosity and orientation to personal growth.
- Ability to thrive in a fast-paced and results-oriented culture.
- Integrity, fairness and sound judgment.
- Intercultural competency and respect for diversity in all forms.
- A balance of self-confidence and humility.
- Ability to argue persuasively, coupled with openness to new information and perspectives.
- High emotional intelligence, communication and relationship skills.
- Flexibility and an entrepreneurial streak.
- Ability to advocate, persuade and influence.
- The courage to take smart decisions and risks.
- Ability to embrace complexity, ambiguity and change.
- A combination of sense of urgency, "fire in the belly" and passion for The Trustees' mission.
- A drive to achieve win-win outcomes.
- A sense of humor.

## THE RELATIONSHIPS

The Chief Financial & Administrative Officer (CFO) reports to CEO Barbara Erickson. The CFO is a member of the Executive Team and manages approximately 15 staff including the Finance, IT, Human Resources and Legal teams plus external auditing, consulting and other relationships. The CFO serves as liaison to the Finance, Investment and Human Capital committees of the Board of Directors.

## THE LOCATION



The position is based at the organization's headquarters in the heart of Boston. The Trustees employs over 200 year round staff and 400 seasonal staff, located at almost 100 locations across Massachusetts. These include four business campuses (Boston, Leominster, Stockbridge, and Florence).

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**For potential consideration or to suggest a prospect, please email**  
**[BostonTrustees@BoardWalkConsulting.com](mailto:BostonTrustees@BoardWalkConsulting.com)**

**or call**

**Kathy Bremer or Patti Kish at 404-BoardWalk (404-262-7392).**

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