



LEADERSHIP PROFILE



President & CEO

Community Foundations of the Hudson Valley
Poughkeepsie, NY

"50 years of responding today, investing in tomorrow"

--CFHV's theme, 2019

EXECUTIVE SUMMARY

The Community Foundations of the Hudson Valley (CFHV) celebrated a remarkable milestone in 2019, reflecting fifty years of committed service to the people and communities of the Hudson Valley. Founded with an original focus on just Poughkeepsie, NY, what has evolved into the Community Foundations of the Hudson Valley now serves the people and communities of three very different New York counties—Ulster, Dutchess and Putnam—under a common banner and a common purpose: *"meeting the urgent and emerging needs"* of a region all hold dear.

The Community Foundations' stakeholders and staff are understandably proud of the progress made over the years and especially over the last decade or so. Assets topped \$84 million in 2019,¹ over three times what they were in 2006 and more than double the assets just over five years ago. The Foundations' cumulative grantmaking since inception exceeds \$50 million, and area nonprofits abound with



¹ Unaudited results

Finding leaders that matter for missions that matter®

stories of individuals and communities who have benefitted and even been transformed by CFHV's generosity and that of its donors.

For much of its history, like many of its peers across the country, CFHV was a receptacle for philanthropic dollars. A continuing emphasis on donor relations will remain a core part of the Foundations' strategy, but the stakeholders most invested in the future of the Hudson Valley want to *inspire* philanthropy, not merely serve it.

To contribute fully to the long-term vitality of the region, CFHV must itself be a model of community leadership—and a model for the kind of engagement, impact, information and support donors deserve as they address the region's most pressing issues. The CEO of the Community Foundations of the Hudson Valley has an enormous opportunity to help lead that journey of generosity.

THE ORGANIZATION

What is now known as the Community Foundations of the Hudson Valley began in 1969 as a local fund facilitating philanthropy in and around Poughkeepsie, NY. Over time, that fund grew through donations, sound management and affiliation with neighboring entities into today's regional force.



Culinary Institute of America, on the Hudson River

The ten-person staff is led by Interim CEO Nevill Smythe, formerly CFHV's Vice President, Programs, who rejoined the Foundations this past summer when the prior CEO resigned. CFHV headquarters remains in Poughkeepsie, augmented by an office in Kingston (Ulster County) and a significant presence in Putnam County.

The Foundations are governed by a volunteer board of trustees comprising 21 leaders drawn from the three counties. The efforts in each county are in turn supported by county-specific advisory boards, with 32 members among them.

The ten-person CEO search committee is similarly drawn from the three-county area. Among its members are six current trustees, three former trustees and a former member of the staff, all long-time supporters of the Foundations.

THE OPPORTUNITY

Community Foundations of the Hudson Valley is at a very special point in its evolution. Everyone associated with the organization is proud of its work, and grantees, program partners and donors alike report great respect for the organization and its staff.

Progress against the last five-year strategic plan, adopted in 2013, is telling. Among other markers, assets more than doubled to \$84 million, as did the average fund size. During the same period, the Foundations' annual transactional volume—the total number of gifts received and grants awarded—decreased by more than 50%, performance one highly experienced community foundation consultant called “one of the most remarkable turnarounds our firm has ever seen.”



In short, through intentional discipline CFHV has made significant progress in shifting its role from that of simple facilitator of charitable transactions to that of true partner in philanthropic strategy. *Examples of CFHV's Farm Fresh Food initiative abound*

The board of trustees has engaged in several discussions in recent months regarding the Foundations' long-term strategy, reserving a more complete strategic review until the new CEO has gotten established. Preliminarily, however, here are some of the questions under review:

- What is our over-arching vision for the Foundations over the next five to seven years? In short, what do we stand for, and what must we accomplish?
- How can we add the most value for our donors and for the communities we serve?
- “Community” is a clear differentiator for CFHV, especially compared to the commercial services available to donors. How do we capture and capitalize on the commitment to community in a region as large, as varied and as mobile as the Hudson Valley?
- “Focus” is increasingly important in grantmaking strategy. What are our options for focus, and what would the potential impact be, for us, our donors, and our current grantees?
- What form should collaborative leadership take as we work with others to identify, define, understand and address the region's most critical needs?

- Which issues or initiatives could we truly own, and which ones are better addressed by others?
- How bold are we prepared to be in setting our own agenda?

The board and staff continue to explore each of these questions, and the CEO will have a considerable hand in shaping the answers in consultation with an array of stakeholders, internally and externally. All involved understand that lasting impact, for both donors and the larger community, requires more than incremental improvements to current operations. They also understand that money is just part of the considerable assets the Foundations can leverage.

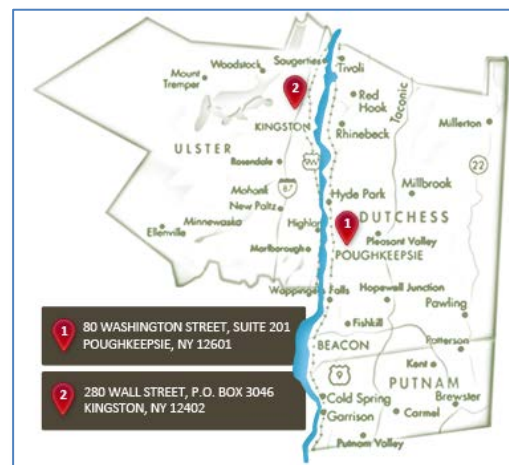
At a December 2019 retreat attended by both board and staff members, the group coalesced around a three-pronged vision for the foundation. There is more work to be done, to be sure, but the prevailing consensus is that at the end of the next decade, CFHV will be integral to community success, trusted to provide transparent leadership and mobilize resources to make a genuine difference on issues that matter, and widely recognized as an innovative and inspiring resource for donors, nonprofits and the community at large to create and implement solutions.

A key part of the CEO's mandate, therefore, will be to work *with the board* to define fully the future, evaluate the alternative paths to that future, and develop a strong consensus for the strategy that holds the most promise—all without undue risk to the Foundations' finances or reputation. Clearly, the role requires an imaginative, thoughtful, collaborative CEO who can excite imaginations, inspire commitments and ensure measurable progress in delivering sustainable impact against some of the region's most intractable challenges.

For more on the Community Foundations of the Hudson Valley, peruse the CFHV [website](#). Click the highlighted text for overviews of [Ulster](#), [Dutchess](#) and [Putnam](#) Counties. A particularly telling study of the region's needs, [Out of Alignment](#), was published in October 2019 by Hudson Valley Pattern for Progress; a 16-page abstract of the findings can be accessed [here](#).

THE LOCATION

The Community Foundations of the Hudson Valley is based in downtown Poughkeepsie, NY, with an additional office in nearby Kingston. The Foundations' service area includes Ulster, Dutchess and Putnam



CFHV's 3 counties and 2 offices

counties, which together encompass some 2200 square miles, an area about twice the size of Rhode Island, and a population of about 575,000.

The Hudson Valley is an extraordinarily beautiful region, rich in history and opportunity. The site of many developments in our nation's evolution, the three counties are also home to [Hyde Park](#) (FDR's home), an enviable array of nationally prominent cultural institutions and unparalleled recreational opportunities.

The area is headquarters for several corporate entities, and the academic offerings are extensive, including such important institutions of higher learning as [Bard](#), [The Culinary Institute of America](#), [Marist](#), [Mount Saint Mary](#), [Vassar](#) and three branches of the [State University of New York](#) (SUNY). Midtown Manhattan is just 90 minutes away.

THE RELATIONSHIPS

The President & CEO reports to	The CFHV Board of Trustees
And manages a staff, currently nine, through six direct reports, some with overlapping responsibilities:	<ul style="list-style-type: none"> • Two Vice Presidents with primary responsibility for asset development, marketing and outreach efforts in Putnam and Ulster Counties respectively • VP, Philanthropy, primarily responsible for relationships with professional advisors • VP, Programs • CFO • Communications Manager
While stewarding other important relationships, such as	<ul style="list-style-type: none"> • Three county-specific boards of advisors • Current and potential donors and their professional advisors • Grantees and program partners • Community stakeholders with shared interests in the Foundation's work, its impact or its constituencies • Community leaders not yet aware of the power of a strong community foundation • Grantmaking peers in the region and beyond

THE CANDIDATE

The next CEO of the Community Foundations of the Hudson Valley will be an experienced community leader demonstrably successful in guiding collaborative efforts by a diverse array of leaders and institutions. The search committee is

open to a variety of career paths, but a record of impact across communities and sectors will be of special interest.

Deep experience with one or more of the region's pervasive issues—poverty, race, food insecurity, educational attainment, workforce development—would add significantly to a prospect's appeal.

Competence: Among the traits being sought, CFHV expects to hire...

- A board-savvy consensus-builder who respects the views of trustees with long-standing commitments to the region even while exposing those trustees to new opportunities for collaboration and impact
- An executive who thrives in an atmosphere of high expectations and accountability—and who embodies same for staff and stakeholders
- An effective and inviting champion for the Foundations, its communities and causes; a CEO who wears authority lightly and pursues success with humility and grace
- An inspiring leader unafraid of bold goals and tenacious in their pursuit while being respectful of those with alternative viewpoints and experiences
- A pragmatic leader who understands the journey of generosity, models the critical role of fund development in a community foundation's success, and embraces the feedback uniquely available from donors
- A natural collaborator who knows when to lead and when to follow, when to take a stand and when to sit down
- An empowering executive who fosters a spirit of community within the team as well as externally



***Poughkeepsie's Walkway over the Hudson,
the world's longest elevated pedestrian bridge***



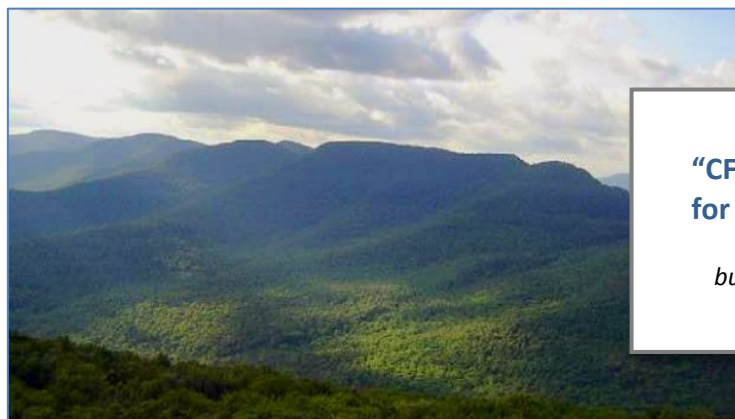
A view of Mohonk Mountain House

- Someone passionate about customer service
- An innovative thinker and bridge-builder who can energize support for shared goals among players not always accustomed to working together
- A respectful, compassionate CEO who never loses sight of the Foundations' core purpose, "meeting the urgent and emerging needs" of the community
- A financially astute manager fully attentive to the Foundations' own business operations.

Culture—CFHV's CEO should exemplify

- A genuine respect for diversity and inclusion; someone quick to seize opportunities to advance equity and opportunity, not as an add-on, but as a central component of community vitality
- Respect for all the people who make a community foundation's work possible, whatever their role or station
- Humility and authenticity in action, never losing site of the responsibility for stewardship inherent in the work
- An accessible management style, emphasizing team over self and collaboration over hierarchy, even while maintaining the disciplines required to sustain operational excellence
- The tireless joy of an active learner.
- Principled leadership informed by experience and transparency, not a personal agenda; one that resonates across constituencies which vary significantly, whether defined by age, economic circumstance, political affiliation, or even deeply held views about the 'proper' role of a community foundation
- An expansive view of resource development; a fearless but nuanced fundraiser
- Cultural and social dexterity; an executive comfortable with the special demands of foundation leadership in a complex and multifaceted region with deep-seated challenges.

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**For potential consideration, or to suggest a prospect,
please email CFHV@BoardWalkConsulting.com
or call Sam Pettway or Diane Westmore at
(404) BoardWalk (404-262-7392)**
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**"CFHV is a resilient beacon
for our community."**

*--A long-time area resident,
business owner & philanthropist*

*Ulster County, NY, whose natural beauty has inspired awe and art,
including the 19th century Hudson River School of landscape painters*