



CARLSONBECK

EXECUTIVE SEARCH FOR PHILANTHROPY & NONPROFITS

## Position Specification



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### Chief Executive Officer

23 October 2024, vF



Carlson Beck advises **Vivalon** on the basis of an exclusive consulting assignment. The following details are for your information and should be shared with discretion.



## Vivalon

### POSITION SPECIFICATION

**THE POSITION:** CHIEF EXECUTIVE OFFICER

**REPORTS TO:** BOARD OF DIRECTORS

**LOCATION:** BAY AREA DESIRED

#### THE ORGANIZATION

##### *The Vision*

#### ***Vivalon: Your Trusted Partner for Healthy Aging in Marin County***

*Vivalon envisions a future where every senior across Marin County thrives. In the next decade, every adult in all of Marin County will know what Vivalon can do for our seniors. From our Healthy Aging Campus, extending to all communities throughout the county, and directly into the homes of Marin seniors, we will be the leading voice on healthy aging, community for older adults, as well as for empowering seniors and their families to live fulfilling, connected lives. Our expertise, thought leadership, and extensive network will provide a comprehensive range of services – from fostering human connection to addressing critical needs.*

*We will accomplish these things through:*

- ❖ Rides: Ensuring mobility and independence.*
- ❖ Meals: Delivering nutritious meals that nourish body and soul.*
- ❖ Classes: Offering stimulating activities and lifelong learning opportunities.*
- ❖ Care: Providing compassionate and reliable care services.*
- ❖ Advice: Offering expert guidance and resources for navigating the aging process.*

*Vivalon will build upon its remarkable success in producing revenue through social ventures to generate the income that makes these offerings possible.*

##### **The Mission**

Vivalon advances independence, health and quality of life for older adults and people with disabilities.

##### **Overview**

Vivalon is the largest nonprofit dedicated to supporting older adults in Marin County. Founded by a grassroots community group in 1954 known as the Marin Senior Coordinating Council, Vivalon helps Marin County’s older adults and vulnerable residents thrive through the power of human connection with rides, meals, classes, care, advice and more. Vivalon’s vision is to ensure that every adult has the opportunity to age with independence,



dignity, and grace.

Marin is the fastest-aging county in California, with projections indicating that by 2030, one in three residents will be 60 or older. The high cost of housing has led many children of older adults to move away, leaving their parents without a robust family caregiver support network. Vivalon believes Marin's older adults deserve the dignity of remaining in their community with access to the necessary resources, connections, and services to age with dignity, independence, and grace.

Vivalon has developed a new community-based model of care for the elderly. The Healthy Aging Campus opened in downtown San Rafael in January 2024 and integrates a medical clinic, Healthy Aging center, and 66 units of safe and affordable low-income housing in one modern and environmentally friendly building. The project is a collaborative partnership with Marin Community Clinics, Eden Housing, and Vivalon.

For more information on Vivalon, please visit: <https://vivalon.org/>.

## **THE OPPORTUNITY**

Vivalon's incoming Chief Executive Officer ("CEO") guides the implementation of the organization's next phase of geographic growth and expansion. Vivalon's recently opened, state-of-the-art Healthy Aging campus in San Rafael brings together housing, healthcare, and human connection. The CEO leads strategic efforts engaging the community, leads, motivates, and fortifies a high-performing staff and committed Board of Directors, and increases organizational collaboration with external partners and funders, while exemplifying the vision and values of the organization's culture.

The CEO leads the organization while embarking on defining Vivalon's future direction. This includes creating and implementing a new strategic plan as Vivalon prepares to meet the needs of a growing aging population in Marin County. Vivalon is at an inflection point, engaging in refreshing and professionalizing business operations and systems, enhancing marketing efforts, exploring partnerships and expanding programming. Vivalon's CEO ensures financial stability and long-term viability of the organization by collaborating with all constituents, continuing and expanding on the organization's legacy and foundation in California and nationally, and leading its next phase of evolution.


### ***Organizational Leadership***

Vivalon has been the go-to transportation and nutrition resource for Marin's older adults and their families, as well as people with disabilities. In addition to transportation and nutrition, programs and services include: Lifelong Learning, Healthy Aging services, classes, activities and advice. Headquartered in San Rafael, Vivalon has an annual budget of \$18 million, a staff of 175, and is governed by a 10-member Board of Directors. The direct reports to the CEO include: Chief Financial Officer, Chief People Officer, Chief Program Officer, Chief Development Officer, and Chief Transportation, Facilities and Safety Officer.

### **Responsibilities**

#### ***Strategic Leadership and Vision***

- Guiding and developing the organization's strategic direction -- collaborating with the Board of Directors and executive operations team -- by identifying goals, core policy/programming areas, and opportunities on which to capitalize to maximize Vivalon's impact.
- Ensuring Vivalon's sustainability by examining and optimizing its organizational structure.

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- Promoting Vivalon’s growth by completing initiatives in the current strategic plan, while also investigating and creating new initiatives to bolster and reimagine the organization’s statewide presence.

### **Financial Management**

- Developing and maintaining sound financial practices by collaborating with Vivalon finance team and the Board Finance Committee in preparing the budget and ensuring Vivalon’s long-term financial sustainability.
- In partnership with the CFO, overseeing contract procurement, as well as implementation and compliance with various government contracts, including expanding current transportation, social services, and healthcare enterprises.

### **Board Relations**

- Regularly communicates relevant organizational and sector developments to the Board of Directors.
- Collaborates with the Board of Directors, optimizing its effectiveness through structural planning and recruiting new members.

### **Fundraising**

- Strengthens Vivalon’s fundraising capacity, working in partnership with the Chief Development Officer, to diversify and increase revenue channels.
- Works with the Board and fundraising staff to ensure adequate revenue for all programs and services, including institutional funding (foundations, corporations), government grants, and individual donors.

### **External Relations**

- Initiates and maintains strong partnerships with government officials, community groups, partner organizations, volunteers and private philanthropists.
- Leads efforts to educate key stakeholders and service providers to maximize the impact of Vivalon’s policy victories, programming, and research.
- Serves as the primary spokesperson and “face” of Vivalon in the field and among the broader community, elevating and amplifying the organization’s brand.
- Strategically publicizes the activities of the organization, its programs, and its goals using platforms appropriate for Vivalon’s various constituencies.

### **People Management**

- Leads, inspires, manages, and retains executive leadership team members and others. Provides them with support, guidance, mentoring, and professional development to maintain Vivalon’s record of excellence.
- Envisions, communicates and promotes a work environment that supports and recruits quality volunteers.
- Continues and enhances Vivalon’s commitment to Diversity, Equity, Inclusion, and Belonging.
- Maintains and expands Vivalon’s mission-driven organizational culture and its thorough, thoughtful approach to maximizing impact.
- Fosters an environment of growth and continuous learning, ensuring that regular performance evaluations are held across the organization, while personally conducting assessments with direct reports.



## CANDIDATE QUALIFICATIONS / EXPERIENCE

**Education:** Bachelor's degree required; a Master's degree in related field preferred.

### Qualifications/Experience:

Prior experience as a CEO, Executive Director or as a member of a senior leadership team of a nonprofit organization with responsibility for financial health and sustainability, P&L management and budget authority experience.

Minimum of 10 years of progressively responsible experience in organizational leadership roles within large, complex organizations.

Experience working in partnership with and providing executive officer leadership to a board of directors, including leading strategic planning and implementation.

Experience guiding an organization through a time of organizational growth, professionalization, and transformation.

Experience with older adults and/or underserved populations, and a key understanding of the changing landscape of services, financing and funding, including the emerging healthcare field in this market, preferred.

A demonstrated fundraising track record, including high-dollar philanthropy.

Experience managing multilayered teams, i.e., managing seasoned, experienced managers.

## COMPETENCIES / ATTRIBUTES

The successful candidate will **be**:

- **A strategic thinker** with a **vision for the future** of senior care in California and beyond;
- **An excellent listener and clear communicator** with broad audiences in **written** and **verbal** messaging;
- **An inspirational leader** that **leverages team expertise to drive** the organization's success;
- **Thorough in planning and approach** to all facets of Vivalon's work;
- **Open to leading and participating in honest conversations** with Board and staff;
- **Culturally competent** and **committed** to Diversity, Equity, Inclusion, and Belonging.

The successful candidate will **have**:

- **Passion** for Vivalon's **mission**, its **record of achievement**, and **excellence**;
- **A results-focused** orientation;
- **High emotional intelligence** and people skills;
- **Ease and confidence** in serving as the **"face" of Vivalon**;
- **Resilience, an open-mind**, and **creativity** in navigating legislative changes and challenges;
- **Skills in building and fortifying relationships, bringing humility and curiosity**, with staff, clients, external partners, stakeholders, and legislators.



## HOW TO APPLY

To initiate consideration for this opportunity, **please submit a resume and cover letter**, speaking to your qualifications as per this Position Specification, to the Carlson Beck representatives below.

## CONTACT INFORMATION

For additional information regarding this opportunity, please contact:

**Sally Carlson**, *Managing Partner*  
415.203.5259 mobile  
[sally@carlsonbeck.com](mailto:sally@carlsonbeck.com)

**Heidi Holzauer**, *Partner*  
707.963.1250 direct  
[heidi@carlsonbeck.com](mailto:heidi@carlsonbeck.com)