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## **Chief Operating Officer/Chief Financial Officer Executive Position Profile**

### **The Opportunity**

Under energetic, new leadership, the American Red Cross Oregon Trail Chapter (OTC) is transitioning to deepen its statewide reach, requiring a hands-on Chief Operating Officer/ Chief Financial Officer (COO/CFO). The COO/CFO's responsibilities will include managing the Portland-based operations as well as the shared services organization that manages regional finances. Reporting to OTC's CEO, and working in partnership with OTC's Chief Development & Communications Officer, the COO/CFO will bring financial and business acumen, visionary leadership, contemporary organizational and management skills, technology savvy and creativity to collaborate with the CEO, Board, staff, volunteers and community partners to help shape the organization's long-term success.

This COO/CFO has both internal and external responsibilities to ensure the organization's ongoing effectiveness as it builds an evolving service model that is focused on strengthening service delivery, increasing community outreach, enhancing visibility, increasing internal diversity, and providing leadership to Red Cross Chapters statewide. The financial responsibility is to lead a staff managing a \$7.5 million local budget as well as the collective \$14 million budget contributed to by four Community Chapters in the state of Oregon. Additionally, the Portland Chapter's operations leader will provide the critical strategic and tactical guidance that ensures forward-looking projects and policies are balanced with sound daily activities.

### **Organization Profile**

The American Red Cross Oregon Trail Chapter was chartered in 1917 as part of the largest humanitarian movement in the world, providing the regional services on which the national organization was founded. Internationally recognized as the premier relief organization, the ARC was founded based on the following principles: humanity, impartiality, neutrality, independence, voluntary service, unity, and universality. While initially founded to protect victims of war, ARC now saves and rebuilds lives - down the street, across the country and around the world - in response to disasters and emergencies of all kinds.

Among the largest 25 chapters in the nation, and a highly respected partner in the national American Red Cross system, OTC is the regional chapter for the entire state of Oregon. Headquartered in Portland, and with offices in Astoria, Hood River, The Dalles, Pendleton, La Grande and Baker City, over 100 employees and over 1,000 volunteers provide relief to victims of disasters, and help people prevent, prepare for and respond to emergencies. For instance, the Red Cross in Oregon *annually* responds to emergencies and disasters every 12 hours (on average), provides 97% of the state's entire blood supply, teaches 100,000+ Oregonians how to be ready to save a life, supports 1,000 of Oregon's military families, and deploys hundreds of trained volunteers to national disasters.

The budget of \$7.5 million is funded primarily through products provided or services organized by the local chapter (\$1.7 million), funds developed through local giving resources (\$2 million), administration of an AmeriCorps grant (\$1.5 million), and various other sources. The Chapter receives no national funds, and its biggest short-term challenge is the loss of almost \$2 million annually in United Way revenue. Almost 70% of that loss has been mitigated through revenue growth and expense reductions, yet much work still needs to be done. The opportunity to continually develop

a proactive and effective strategy to educate the community and build an even stronger base of funding is exciting.

In 2007, OTC became the Regional Chapter for the state, charged with providing support and oversight to Oregon's Community Chapters headquartered in Salem, Eugene, Medford and Bend. In 2008, OTC and its Community Chapters launched a shared services model of centralized accounting and finance functions in Portland. There are additional opportunities to realize cost savings through implementing more effective systems and efficiencies. The accounting function and systems need attentive and thoughtful management in order to meet the needs of this and other chapters. OTC, while financially healthy, needs a strong COO/CFO to shore up the finances and operate OTC as a business with a heart, making smart business choices while retaining an appreciation for OTC's role to serve.

### **The Position**

The COO/CFO is responsible to the CEO and oversees all aspects of the business including programs (Emergency Services and Health & Safety), financial management, administration/HR (staff and volunteer management & leadership), and information technology. Refined skills in management, collaboration, communication, research, evaluation, analysis, forecasting, decision making, and most importantly, mature judgment, will be necessary to move OTC forward. Specific responsibilities include:

**Business Operations:** Guide and oversee the successful completion of all service and operational goals and objectives in the OTC business plan. Use strong general business and decision-making experience to make sound operational and programmatic decisions on a timely basis. Ensure Emergency Services and Health & Safety programs continue to effectively meet emergency and educational needs of local communities. Demonstrate flexibility and an ability to modify programming in order to show OTC's proactive, external face to the communities it serves.

**Financial Management:** Provide leadership and the necessary attention to transition finance to provide effective shared services to the regional chapters. Coordinate budget development process and leverage revenue to create highest returns for the organization. Partner with Development, considering additional revenue streams while retaining the service focus in revenue and expenditure assessment. Ongoing refinement of the accounting, information systems and reporting to ensure comprehensive, accurate and timely financial reporting for all partners. Continually monitor and improve internal controls.

**Leadership/Management:** Help align and articulate the mission and vision for OTC and the regional chapters that inspires people both internally and externally to work toward shared goals and unity among chapters. Use positive contemporary management practices to lead organization and volunteer members, human resource development, and technology platforms. Develop positive relationships with staff that include coaching, mentoring, and training; set clear direction and expectations while fostering teamwork and a passion for the ARC mission. Respect history of the organization while refining culture to be increasingly relationship and trust-based and empowering of employees. Use personal enthusiasm, energy, humor, and problem solving skills to manage by example.

### **Experience & Qualifications**

A successful candidate will possess an undergraduate degree, preferably in business administration and 10 years successful experience managing non-profit or private industry financial and administrative operations as well as overseeing programmatic areas. In-depth experience overseeing organizational human resource activities, technology platforms and systems, and developing and administering multi-program budgets and reporting systems is necessary, as is oversight of multiple program areas or profit centers. Experience working with external stakeholders and managing a professional staff will be required. Background in a service industry would be helpful.

A viable candidate will possess excellent written and verbal communication skills along with the ability to manage multiple multi-deadline projects, employ technology to help meet business objectives, and manage a diverse work staff. Demonstrated success solving problems with the ability to see the “big picture”, along with a strong work ethic, are critical to success.

It is important for a candidate to feel excitement about and a commitment to the mission of ARC. Proven skills as a planner, strategist, and leader who collaborates and possesses exceptional interpersonal skills will have the best chance for success. Compensation will be competitive and commensurate with the successful candidate’s experience. If interested, please contact:

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