



CARLSONBECK

EXECUTIVE SEARCH FOR PHILANTHROPY & NONPROFITS

Position Specification



Project Director

18 August 2021



Carlson **Beck** is a retained executive search firm specializing in serving the nonprofit and philanthropic sectors. The firm work at the top of organizations (CEO, President, Executive Director) and at the C-suite or executive leadership team level.



POSITION SPECIFICATION

THE POSITION:	PROJECT DIRECTOR
REPORTS TO:	MANAGING PARTNER
LOCATION:	VIRTUAL – PACIFIC OR MOUNTAIN TIME ZONE PREFERRED

Sally Carlson, Managing Partner, founded Carlson Beck LLC, a retained executive search firm, with an intentional and exclusive **focus on leadership for nonprofit and philanthropic organizations**. The firm is a **minority- and woman-owned business** enterprise. Sally has an extensive background in executive search in both the for-profit and nonprofit sectors. She has assembled a highly experienced team of search professionals who share a commitment to provide outstanding service in executive search.

Our Best Practices Profile

- ❖ ***Partner-led search process.*** A Partner will execute all the critical components of your search process; this includes in-person candidate interviews, writing candidate presentations, and presenting candidates to be interviewed by the Client.
- ❖ ***Best practices and resources of a large firm / small firm focus and service.*** The majority of our team members have been trained in search strategy and methodology at a best-in-class global search firm. We can deliver this caliber of work to our clients – Public Policy Institute of California, Obama White House, Brookings Institution, Marin Community Foundation – and candidates – Mike Buhler, CEO of Fort Mason Center for Arts & Culture, Kyriell Noon, CEO of Hamilton Families – with the required resources because we enjoy working at this level of professional excellence.
- ❖ ***Tenacity and creativity.*** We engage in creative thinking with our clients. We are committed to working through any challenges that may arise for the Client during the search process.
- ❖ ***Diversity.*** It begins with our firm and extends to our candidate base. We have a successful track record of presenting and placing professionals who contribute to the desired diversity of our client organizations.
- ❖ ***Personally, we are mission-driven and active volunteers.*** We serve on Boards of Directors; we devote our time to sustaining the work and presence of nonprofit organizations in our communities.



Our Values

These are the values that inform and guide our approach and the execution of our work:

- ❖ **Integrity:** We are honest, forthright, and transparent with our clients and candidates. We present both the Client organizations and the professional candidates in their totality without bias or distortion. We are committed to our role as trusted advisor.
- ❖ **Professionalism:** We maintain confidentiality and trust with both our clients and candidates. We treat candidates professionally and respectfully; we are serving in a trusted advisor role to them just as we are with our clients.
- ❖ **Commitment to Mission:** We take each Client and its mission as seriously as if we were fiduciaries because, by virtue of our partnership with the Client organization, we are.
- ❖ **Diversity and Inclusion:** We value the positive impact our executive search work has on the leadership of and organizational culture in nonprofits and philanthropy. The diversity and experience of our staff and our intentional inclusivity in our candidate development enables us to engage experienced and diverse professionals for our clients.

THE POSITION

The Project Director provides comprehensive administrative and project management support to the Managing Partner and the Carlson Beck team. The position handles all the daily processes to ensure the high-quality and successful completion of every search. The Project Director is expected to be energetic, proactive, and strategic, detail driven, and able to independently prioritize and execute their work. It is important that the person have well developed interpersonal skills, strong communication skills, and be highly professional.

The Project Director is a **key part of the team and critically involved throughout the life cycle of the search**. Each search team generally consists of the Managing Partner, a Partner or Principal, a Researcher, and the Project Director. Our firm's team members work remotely; the majority of the team are in the Pacific Time and one team member is in Central Time. The Project Director will work with more than one consultant and several teams at the same time. Each participant on the team has a distinct and complementary role in the search process. All are focused on one shared outcome: the successful completion of each search accomplished professionally, efficiently, and with the best possible outcome for the Client. The Project Director functions as a most essential member of the search team working to focus and coordinate the entire process and supervise the working dynamic across teams.

Skills and Abilities

The Project Director should have a willingness to take on responsibility and determine sound decisions in partnership with the CB consultant. The Project Director is encouraged to use their business best practices, good judgment experience, tact, and diplomacy to establish professional relationships with their colleagues. These same attributes are required for the Client and external relationships of the firm. We are a client-centered, candidate-focused professional services executive search firm. The Project Director **must be discreet and able to hold confidential information appropriately**.



Additional attributes would include:

- Project management capabilities – able to work as a key member of team for each search, tracking the activities of the other team members, the Client, and the candidates, and ensuring the Project Director responsibilities for each search are conducted in a timely and accurate manner. These could include (this is not a comprehensive listing):
 - scheduling of calls with Client board members
 - scheduling interview of candidates with CB team members
 - managing the verification process for candidate educational credentials
 - updating the candidate database to ensure accuracy and completeness of information
 - drafting key search related documents, such as a Candidate Matrix or first draft of a Position Specification
- The ability to work independently and collaboratively to ensure timely task management and delivery;
- Excellent interpersonal, oral, and written communication skills across diverse working groups;
- Problem solving skills – the ability to identify possible solutions to problems either self-identified or identified by other members of the search team, and present the possible solutions, with an evaluation of each, to the appropriate search team member(s);
- A mindset and standard of excellence **in the attention to detail and accuracy** – this is a critical skill set. We are seeking a professional who strives for excellence in all aspects of work performance;
- Self-motivation and the ability to successfully drive outcomes forward;
- The ability to anticipate needs; and
- A sense of urgency and responsiveness to consultant and Client needs.

Executive Search Skills and Responsibilities

The Project Director functions as the Managing Partner’s representative and is expected to have the temperament, poise, and demeanor that are consistent with a professional functioning at a high level of visibility. The person will hold a position of trust and must possess a high level of integrity and strong character.

The successful candidate will have this skill set:

- Excellent oral and written communication skills;
 - Frequent, daily communication with the Managing Partner and Consultants to include work progress, questions, updates in response to requests, and shared information.
 - Timely and accurate execution of deliverables to the Client
 - Strong attention to detail is critical, particularly for materials for the Client.
- Demonstrated flexibility; able to adapt to changing circumstances, often reflecting Client or candidate changing preferences
- Demonstrated ability to manage multiple tasks and projects simultaneously;
- In communication with CB search team members, able to establish priorities and manage appropriate deliverables to completion;
- Manage delivery of high-quality materials with ongoing and overlapping deadlines often within short time constraints;

- Develop and/or maintain professional relationships with CB team members, Clients, prospects, and candidates.

Scheduling is the lead task for this position. It is critical to the progress of the search. It requires excellent organizational skills, a sense of urgency, and fastidious attention to detail. The Project Director for executive search has administrative responsibilities for scheduling in two areas of search work: the Client and the Carlson Beck Managing Partner and search team.

For the Client, scheduling requires a professional, informative, and helpful manner. The interaction of the person in this position with the client sets the tone and establishes the administrative reputation of the entire firm. Scheduling and administrative Interactions with the Client include:

- Manage each search to ensure the process stays on track with the Client. This includes scheduled document preparation or management, scheduling, coordination of group meetings (internal and external), and prioritization of workflow and deliverables for the Client.
- Coordinate assignment calls, extensive interview, and meeting schedules with the client;
- Prepare status memos and engagement letters, initiate degree verifications, manage obtaining and distributing the required documents from the Client, i.e., executed NDAs, organizational materials for candidates, etc.

For the Managing Partner and the Consultant, scheduling is a critical component to assisting their efforts to meet the needs of the Client and provide for a successful outcome to the search. Scheduling and administrative support for the Firm includes:

Managing Partner and Consultant Administration

Scheduling:

- Business Development meetings with potential Client organizations
- **Client meetings with Managing Partner and CB search team members**
- Client **Discovery Meetings and Calls** with Managing Partner and CB search team members
- **Bi-weekly Client Search Committee Calls** with appropriate CB search team members
- Candidate **Interviews with Managing Partner**
- Candidate **Interviews with Client** representatives, including Search Committees
- Candidate **Reference Calls** with Managing Partner
- **Courtesy Meetings** or Calls
- **Placement** Follow-up
- Impromptu client or candidate calls/meetings

Firm Administration

- Edit, proofread, and format business development proposals; gather materials for RFP requests; and Candidate Matrices.
- Weekly calls with Managing Partner and CB team members
- Update agenda for weekly firm business meeting
- Manage completion of items generated from the meeting
- Manage vendor relations such as tech support, health insurance, and firm subscriptions



Education: Must have a high school diploma; a college degree is preferred.

Experience: In addition to education, a stable work history of five to ten years of experience with increasing levels of administrative responsibility is required, ideally in professional services and/or executive search.

COMPENSATION

A competitive compensation package, including a comprehensive benefits package, will be offered, commensurate with experience.

For additional information regarding this opportunity, please contact:

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