

Position Profile

On behalf of our client,

Financial Executives International, FEI Twin Cities Chapter,

*CohenTaylor Executive Search Services
is conducting a retained executive search for its*

Executive Director



fei®

twin cities chapter
connecting financial executives

FEI (National Perspective)

Mission

FEI's mission is to advance the success of senior-level financial executives, their organizations and the profession. Since 1931, FEI has been connecting members through:

Interaction:

Providing local and international forums for connecting with your peers;

Information:

Providing you with insight to assist in informed business decisions;

Influence:

Providing authoritative representation for your interests;

Integrity:

Providing tools to advance the profession through ethical leadership.

Vision

FEI's vision is to be recognized globally as the leading organization for senior-level financial executives.



The Organization

Financial Executives International is a network of 10,000+ best-in-class financial professionals with 77 Chapters globally. FEI is a membership driven association with a goal of connecting financial executives, and provides peer networking opportunities, emerging issue alerts, personal and professional development and advocacy resources that advance the success of FEI members, their companies, and the profession.

FEI members share a unique experience. At both chapter and national levels, they have front-line involvement in pertinent business issues of the day. Legislators, regulators and standard-setters seek FEI's opinions and testimony, as do the lending and investing communities, economic research organizations, and the accounting and legal professions.

FEI members have an opportunity to engage with senior financial professionals at both the local and national level during regularly scheduled events. Through FEI publications, members are kept abreast of the latest accounting and financial developments with options to earn Continuing Professional Education (CPE) credits. Monthly chapter meetings include an opportunity to participate in quality professional education seminars and to hear local and national speakers discuss a variety of relevant topics.



“FEI offers a wide variety of opportunities to stay current on important topics. Through learning about the experiences of different organizations, I often gain a new perspective on my own organization.”

► **Laurie Lafontaine**
Board Member, Audit/Finance Committee Chair; Multiple Boards
Member since 2010

FEI National History

Financial Executives International was founded in 1931 as the Controllers Institute of America. The expansion of responsibilities of financial executives into policy-making areas led the group to change its name to Financial Executives Institute in 1962. As the global economy developed, it was the driving force in forming the International Association of Financial Executives Institutes in 1969. In November of 2000, it became Financial Executives International and opened membership to financial executives from around the world. FEI proactively helped design the CFO Act and has a history of supporting legislation that enhances the business climate. The largest chapters are in Boston, Silicon Valley, Dallas, Chicago and Minneapolis/St. Paul.

In total, FEI has 77 chapters across the U.S., Canada and Japan. It is headquartered in Morristown, NJ, with offices in Washington, DC. FEI Canada was established in 1973 to serve the needs of its Canadian members and consists of 11 chapters and a membership that includes senior financial officers who face common issues and challenges. FEI Japan was established in 2012 and has 1 chapter.

FEI, Twin Cities Chapter

The Twin Cities chapter of FEI is one of the largest and most successful chapters, with 400 members representing a broad cross-section of industries including for-profit and non-profit companies, academia and government.

The Twin Cities Chapter of FEI utilizes a Strategic Partner Program that features the expertise of select professional service organizations to further the mission of FEI and provide key resources for the Chapter's Membership Growth, Programming, and Professional Development objectives. Current strategic partners include organizations such as Wells Fargo, PNC, and Bank of America Merrill Lynch. For a complete list, click [here](#).

The governing body of the Twin Cities Chapter of FEI is its Board of Directors. The Board is comprised of 15 members with flexibility to add members with desired skills when needed. The Board includes members of the Executive Committee, the Secretary, the Treasurer and at-large Board members.

FEI Twin Cities regularly hosts prominent local and national speakers from a variety of professions. Recent speakers range from Olympic Gold Medalist Summer Sanders to Lou Stevens of the US Secret Service.

Fast Facts

FEI, Twin Cities Chapter

- The FEI, Twin Cities Chapter has approximately 400 members
- 9 Chapter meetings annually
- 3 Career Management Meetings
- 3 one-half day Professional Development sessions annually
- 15-member Board of Directors
- Annual Budget: of \$300,000

FEI – National

- FEI represents over 10,000 leaders nationally
- There are 77 chapters globally and nine technical and advisory committees
- Membership qualifications include:
 - Chief Financial Officers
 - Controllers
 - Treasurers
 - Tax Executives
 - Select members from academia and government
 - And more...

For more information about the local and national organization please visit:

FEI, Twin Cities Chapter:

www.feitwincities.com

FEI – National:

www.financialexecutives.org

The Role

FEI, Twin Cities Chapter seeks a dynamic and entrepreneurial self-starter to serve as its first Executive Director. As one of the top three performing FEI Chapters in the nation and recognized for their innovative and creative approach to membership growth and their efforts in diversity and inclusion initiatives, the Chapter expects that the new Executive Director will serve as catalyst for continued chapter growth and evolution. In collaboration with the Board, this leader will execute a vision and multi-year strategic plan for the organization

As the primary external face and voice of the organization, the Executive Director will lead with passion and ambition to promote FEI, Twin Cities Chapter's mission of advancing the success of senior-level financial executives, their organizations and the profession.

With the support of a strong and tenured Board of Directors, the Executive Director will serve as a visionary leader who will drive the execution of the strategy and change required to stay current within the finance association space. The Executive Director will be responsible for the development and successful implementation of a comprehensive member recruitment plan, and retention and engagement strategies to ensure a robust and invigorated membership base.

Working across diverse stakeholder groups, the Executive Director will conduct outreach to current and prospective members, strategic partners, and the community to create greater brand awareness. The Executive Director will collaborate with volunteers and external partners to develop and implement well run and relevant programs, securing speakers aligned with the organization's vision and strategic plan.

Although a virtual-office position, there will be occasional travel and attendance required for strategic partner engagement and FEI events, both in the Twin Cities Metro area and nationally. Therefore, the ideal candidate would be a local resident of the Minneapolis/St. Paul metropolitan area.

Specific leadership responsibilities of this role include:

Membership Development, Retention & Engagement

- Drives membership and recruitment strategies, engaging the appropriate resources for implementation.
- Creates and maintains relevant program offerings and develops innovative content that continues to define and improve the FEI value proposition for membership. Programs should align with the overall organization strategy to provide a clear return on investment for the member dollar.
- Creatively and effectively increases member engagement in events and education offerings to retain members and increase overall brand awareness.

Management, Finance and Operations

- Strengthens the association's financial base with opportunities to develop alternative revenue streams.
- Oversees the preparation of the annual budget; maintains oversight to ensure FEI, Twin Cities Chapter activities are within budget.
- Manages the day-to-day operations of FEI, Twin Cities Chapter.
- Provides oversight and management of all contract employees and vendor relations to ensure they are in alignment with annual goals and objectives.
- Is skilled in project management and organizational dynamics to manage multiple tasks and objectives.



▶ **John Griffiths**
Pricing Director, Nilfisk-Advance
Member since 2003



Board Relations

- In collaboration with the Board, develops and executes a vision and multi-year strategic plan for the organization. Facilitates annual strategic planning meetings and oversees all tactical administration of the Strategic Plan.
- Serves as a liaison with the Board and Committees; works directly with the Board Chair to organize Twin Cities Board Chapter Meetings.
- Participates in onboarding of new Board and Committee members.

Stakeholder Management

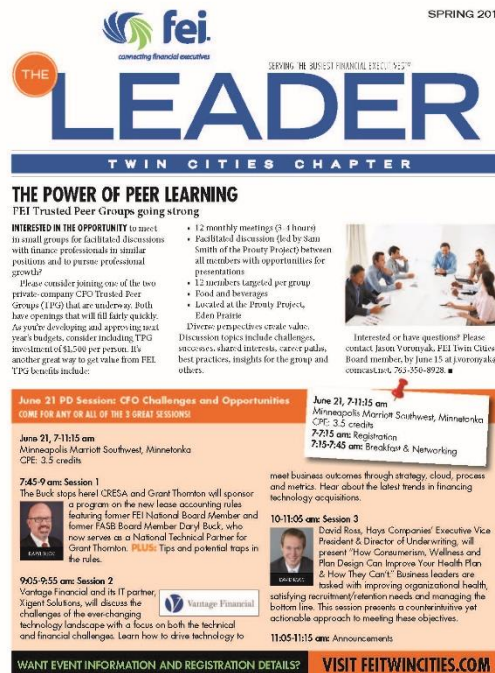
- Builds and maintains strong relationships and alliances with FEI National, Strategic Partners and local Chapter stakeholders. Partners with FEI National and other FEI Chapters to identify and implement best practices.
- Represents the Chapter at relevant business functions and showcases the expertise of FEI, Twin Cities Chapter.

Volunteer Engagement & Leadership

- Provides leadership and fosters a volunteer culture consistent with the Chapter's values.
- Recruits, leads and engages volunteers in an inspirational manner.
- Effectively manages volunteer engagement and participation.

Communication

- Develops communication strategies, with a focus on digital and online media, to both inform and build relationships with members and related constituencies.
- Creates a marketing strategy that will build and enhance the FEI, Twin Cities Chapter brand on a local and national scale.
- Oversees Chapter communications and mailings, including but not limited to the newsletter, and Annual Chapter Directory.



Pictured Above: The front page of FEI Twin Cities' newsletter, The Leader- Spring 2018 Edition

The Ideal Candidate

The following represents competencies and characteristics of the ideal candidate:

- A client-service focus; serving as a true concierge to FEI members with a demonstrated understanding of the role of financial executives and the challenges they face.
- An entrepreneurial and bold leader; with a creative and innovative mindset to challenge the status quo and explore new ways of doing things to meet member needs.
- A growth-oriented leader with a business development mentality to expand membership and identify and develop additional strategic partners in collaboration with Chapter Leadership.
- A passion for the financial industry profession; a demonstrated ability to serve as the face and voice of the organization.
- A self-starter; a leader invigorated by the opportunity to create and support the organization, serving as pioneer model for other FEI chapters to follow.
- A leader with executive presence and polish -- skilled at establishing credibility quickly and across diverse stakeholder groups.

- A goal-oriented leader with a specific focus on creating a premiere brand and identity for FEI, Twin Cities Chapter with a focus on membership, programs and strategic partnerships.
- A passion for superior, high-quality events and event planning; an innate understanding of the 'wow' factor.
- A leader skilled in enhancing brand awareness through communication and marketing strategies.
- A leader with a demonstrated ability to drive proactive, quality outcomes across operations, while creating efficiencies and optimizing engagement with outside vendors.
- A detail-oriented leader with technological savvy; and an analytical and organized approach to work.

Requirements/Preferences-

- 5 years relevant professional work experience
- BA/BS required, Advanced Degree preferred.
- Certified Association Executive designation by the ASAE (American Society of Association Executives) or equivalent, preferred.

For more information or to send your credentials, please email info@cohentaylor.com

All inquiries will remain confidential.