



CARLSONBECK

## Position Specification



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## President and Chief Executive Officer

03 February 2026, vF



Carlson Beck LLC advises **Community Foundation for Monterey County** based on an exclusive consulting assignment. The following details are for your information and should be shared with discretion.



## POSITION SPECIFICATION

**THE POSITION:** PRESIDENT AND CHIEF EXECUTIVE OFFICER

**REPORTS TO:** BOARD OF DIRECTORS

**LOCATION:** MONTEREY, CALIFORNIA

### ORGANIZATION

#### *Mission Statement*

To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County.

#### *About Community Foundation for Monterey County*

The Community Foundation for Monterey County (“CFMC”) is a community leader dedicated to bringing people, nonprofits, and resources together to address community issues. Originally incorporated in 1945 as the Monterey Foundation, it changed its name to Community Foundation for Monterey County in 1984, opened up a Salinas office and broadened grantmaking countywide. Today, CFMC has offices in Salinas and Monterey, has granted more than \$400M to Monterey County nonprofits, and annually awards \$2M in scholarships. The work of CFMC is performed by a dedicated, diverse and competent staff who are executing to the organizational goals of community impact, philanthropic leadership, community leadership, and organizational leadership.

CFMC is known for leading collaborative, cross-sector initiatives that create meaningful impact throughout Monterey County. Examples of CFMC’s meaningful impact include CFMC’s Center for Nonprofit Excellence, a resource center for nonprofits and their leaders, the Monterey County Gives! Campaign, Community Organizations Active in Disasters (COAD), Salinas Inclusive Economic Development Initiative, as well as the Community Impact Investment program. During times of crisis, CFMC serves as a philanthropic first responder, rapidly deploying aid through efforts such as the Monterey County Fire Relief and Storm Relief Funds, distributing millions of dollars to nonprofits assisting affected communities.

Today, the organization has a staff of 29, an operating budget of \$6M and a Board of Directors of 18 members. As of December 31, 2025, CFMC has \$475M in AUM (assets under management).

Please see <https://cfmco.org> for more information on Community Foundation for Monterey County.



## THE OPPORTUNITY

The Board of Directors of the Community Foundation for Monterey County seeks a bridge-building, visionary executive with the knowledge and integrity to lead this trusted philanthropic enterprise focused on meeting the needs of the residents throughout the diverse, wide-ranging communities that comprise Monterey County.

The next President and Chief Executive Officer (“CEO”) will be a trusted convener, encouraging inclusivity, and advocating aspirational and pragmatic solutions to countywide issues. The CEO will continue to build assets under management and to attract new donors.

The CEO will report to a high functioning, well-respected governing Board and will be responsible for leading and managing, inspiring and retaining, a highly professional, high performing staff.

This is an exciting executive leadership opportunity for community impact in one of the most beautiful of California’s coastal counties.

## THE POSITION

The CEO of CFMC provides strategic vision and leadership to advance the Foundation’s mission of fostering healthy, safe, and vibrant communities throughout Monterey County. Working closely with the Board of Directors and committees of the Board, the CEO guides organizational strategy, community leadership, and philanthropic impact while enhancing the organization’s financial health, stellar reputation, and caring for the high performing staff.

The CEO leads CFMC with vision and purpose, aligning resources, programs, and operations to drive meaningful change. The CEO serves as CFMC’s chief ambassador, building strong relationships with donors, nonprofit partners, public agencies, and community leaders. Through proactive leadership and community partnership, the CEO ensures CFMC continues to be a trusted leader and changemaker, ensuring positive impact across the many diverse communities of Monterey County.

The CEO is a public leader who engages externally but leads internally by inspiring and empowering the staff to perform at their best. The CEO is responsible for guiding the staff’s work on ensuring the operational infrastructure can support future growth, sound operations, efficient technology tools and systems, and cross-departmental communication.

The five direct reports to the CEO include:

- Vice President of Community Impact
- Vice President of Philanthropic Services
- Senior Vice President of Finance and Human Resources
- Director of Operations
- Director of Community Initiatives and Partnerships

## CORE RESPONSIBILITIES

### ***Strategic Leadership***

- Provides visionary and operational leadership, partnering with the Board of Directors and staff to define and advance organizational goals, strategies, and priorities that strengthen CFMC’s mission, vision, and reputation as a trusted community philanthropy leader.

- Cultivates effective relationships with community members and external partners, including donors, advisors, nonprofit leaders, business partners, and civic stakeholders and to expand CFMC's impact throughout Monterey County.
- Recruits, develops, and retains exceptional Board members and staff, representing the communities of Monterey County, to ensure long-term organizational excellence and sustainability.
- Supports Board committees' effectiveness with relevant materials, partnership, and engagement.
- Cultivates a transparent, productive thought partnership with the Board of Directors.

#### ***Community Building, Advocacy, and External Relations***

- Serves as the primary public representative, promoter and spokesperson for CFMC, proactively elevating the foundation's visibility and leadership role throughout Monterey County. Clearly articulates CFMC's purpose, responsibilities, and value as a community foundation and philanthropic partner.
- Leads and supports fundraising efforts by cultivating and strengthening relationships with current and prospective donors, as well as their financial and legal advisors, to grow philanthropic resources for the community.
- Engages with a broad and diverse network of community, nonprofit, business, and public-sector leaders to identify emerging needs and position CFMC as a trusted convener, collaborator, and leader on complex community challenges.
- Advances policy and systems-change efforts, when appropriate, by effectively communicating CFMC's perspectives and priorities in support of community well-being.

#### ***Organizational and Financial Management***

- Provides clear expectations, coaching, mentoring, and performance feedback, ensuring accountability and measurable outcomes across the organization.
- Ensures a diverse, inclusive workplace culture that promotes staff well-being, professional growth, and work-life balance.
- Partners with the Senior Vice President of Finance to ensure excellence in financial management, operational systems, and organizational processes.
- Serves as chief steward of CFMC's assets, working with donors, advisors, and investment partners to safeguard and grow charitable resources.
- Ensures financial health and sustainability through budgeting, forecasting, and long-term planning.

### **CANDIDATE QUALIFICATIONS / EXPERIENCE**

- Education:** Bachelor's degree or equivalent experience required, with demonstrated understanding of organizational leadership, community and economic systems, research and problem-solving methodologies, budgeting, and financial analysis. An advanced degree is desirable.
- Experience:** A minimum of ten years of progressively responsible leadership experience in the nonprofit, philanthropic, public or private sectors. Experience with a community foundation or comparable philanthropic organization is strongly preferred. Spanish language capabilities is a meaningful plus.
- Location:** To be an effective leader for Community Foundation for Monterey County, it is imperative that the CEO is, or will become, a resident of Monterey County.



## COMPETENCIES / ATTRIBUTES

The successful candidate will **be**:

- Deeply committed to CFMC's mission and the transformative power of community philanthropy.
- A strategic thinker and planner with a strong track record of translating vision into effective strategy and execution.
- A compelling and credible fundraiser who can clearly articulate CFMC's value proposition, including both philanthropic impact and technical considerations.
- Adept at navigating the politics and dynamics of a diverse county with stakeholders representing rural, urban, coastal and agricultural communities; someone who will seize the opportunity to address the societal challenges that exist in Monterey County.
- A community-centered convener and catalyst who activates the collective power of a diverse network of stakeholders.
- An exceptional relationship builder, comfortable engaging with a wide range of stakeholders, including donors, nonprofit leaders, business executives, and public officials.
- Focused on building and stewarding philanthropic funds as a cornerstone of CFMC's long-term impact.
- Supportive of technology and innovation that enhance CFMC's effectiveness and reach.
- Experienced in partnering effectively with a Board of Directors, including supporting board recruitment, development, and strong governance practices.
- Culturally competent and deeply committed to diversity, equity, and inclusion in both external community impact and internal operations.
- Collegial, respectful, and empowering, while holding self and others to high standards of excellence and accountability.
- Skilled at prioritizing and managing competing demands while maintaining clarity of purpose and organizational focus.
- Comfortable making difficult decisions and communicating rationale with transparency and integrity.
- Authentic, humble, curious and values driven.
- Willing to set down roots in Monterey County.

The successful candidate will **have**:

- Thorough understanding and technical knowledge of philanthropy and charitable vehicles, including UPMIFA and nonprofit investment strategies.
- Ease and confidence in externally focused work, including public speaking and relationship building with donors, community-based organizations, and civic leaders.
- Accessible and approachable to staff, partners, and community members.
- A strong customer-service orientation that informs leadership style and decision-making.
- Strong synthesis, writing, editing, and communication skills, paired with excellent listening ability.
- Exceptional interpersonal and team collaboration skills, with a proven ability to build consensus.
- A demonstrated record of effective diplomacy and ethical leadership.
- Thoughtful orientation toward policy advocacy when appropriate.
- Interest in leading at the sector level, demonstrating best practices, an interest in learning from others, and a commitment to information sharing.
- A sense of humor, emotional intelligence, and a well-grounded ego.

**It is not necessary to meet all the criteria above to apply for and be considered for this critical position.**



## COMPENSATION

An annual salary ranging from **\$320,000 to \$360,000** will be offered commensurate with experience, plus a comprehensive benefits package.

## HOW TO APPLY / WHERE TO DIRECT QUERIES

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

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

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

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## A Brief Overview of Monterey County

Monterey County is located on the central Pacific coast of California and is home to miles of beautiful beaches, spectacular mountain ranges, groves of redwoods, low-rolling foothills, and a bountiful valley. It is known for its scenic coastline and its temperate climate creating ideal agricultural conditions. It is bookended by the counties of Santa Cruz and San Luis Obispo. Tourism spending and agriculture output contributes more than \$7 billion a year to the county's economy.

Monterey attractions include Big Sur, Carmel-by-the-Sea, Cannery Row, Pinnacles National Park, and Ventana Wilderness and the agriculturally rich Salinas Valley, also known as the "salad bowl of the world". Monterey County is known for annual events, such as the Monterey Jazz Festival and AT&T Pebble Beach Pro-Am golf tournament. Noteworthy institutions of higher education and research in Monterey County include California State University at Monterey Bay, Monterey Peninsula College, Hartnell College, and Moss Landing Marine Labs. Additionally, Monterey is home to the prestigious Naval Postgraduate School and Defense Language Institute.

According to the 2020 census, the County's diverse population of 439,000 has nearly 63% identifying as Hispanic/Latino, 26% identifying as White/non-Hispanic, 7% as Asian/Native Hawaiian/Pacific Islander, and 3% as Black. Eighty-five percent of residents live in urban areas and 15% in rural areas.

Monterey County is represented by two members in the U.S. House of Representatives. It also has five members serving on the County Board of Supervisors representing the rich diversity of the county.