



PRESIDENT AND CEO
COLORADO STATE UNIVERSITY FOUNDATION
Fort Collins, Colorado
<https://foundation.colostate.edu/>



The Aspen Leadership Group is proud to partner with the Colorado State University Foundation in the search for a President and CEO.

Colorado State University is a university on the rise. The University is committed to excellence, setting the standard for public research universities in teaching, research, service, and extension for the benefit of the citizens of Colorado, the United States, and the world. Total student enrollment is approximately 33,000, and the University employs 1,846 academic faculty, 3,500 administrative professionals, and 2,000 classified staff. Colorado State University is recognized in national rankings and is the school of choice for Colorado students, with a longstanding legacy of attracting the best and brightest nationally and internationally.

The President and CEO is responsible for overseeing CSUF in its mission to receive, manage, and invest gifts on behalf of the University. CSUF's goal is to enhance the purchasing power of the University's endowment while achieving the maximum total return consistent with safety of principal. Assisting the University President and the CSU Foundation Board of Directors in advancing the University in its mission and goals is also of great importance to the President and CEO. The President and CEO is accountable for working effectively with CSUF and the University employees, donors, alumni, friends, and students from various and diverse backgrounds, delivering high quality and effective investment management, being an effective partner with the University President and Vice President of Advancement and a trusted team member with the vice presidents, deans, and others in building understanding of CSUF's services, expertise, and relationships with and to the University.

The President and CEO will oversee a staff of 16 and Foundation assets in excess of \$500M. Candidates should have extensive knowledge and experience in financial services and investment/asset management; a passion for Colorado State University and its Land Grant mission along with commitment and dedication to the purpose and mission of CSUF; knowledge of fundraising; extensive experience—and success in leading and developing high quality interactions and relationships with individuals of all levels in various organizations and groups with multifaceted and multi-disciplinary goals and functions; and success in building teams, systems, operations, service standards, controls, and practices in operational management and/or financial management.

The President and CEO of the Colorado State University Foundation serves as its primary representative to Colorado State University (the University) and the Board of Governors of the State of Colorado University System (the System), and is responsible for CSUF's overall performance.

With the highest level of personal and professional integrity, the President and CEO leads the development and execution of the strategic relationship between CSUF and the University, ensuring it is maintained and enhanced. The President and CEO effectively communicates the mission of CSUF, including its short and long-term goals, and its services to the University and the System, providing the utmost level of accountability for CSUF's operational, ethical, and fiduciary integrity in all transactions and relationships.

REPORTING RELATIONSHIPS

The President and CEO will report to the Chair, Board of Directors on behalf of the Colorado State University Foundation Board of Directors.

PRINCIPAL OPPORTUNITIES

This is an extraordinary time for Colorado State University. Under the visionary leadership of Dr. Tony Frank, 14th President of the University and Chancellor of the CSU System, we're re-envisioning and redefining the role of a 21st Century Land Grant University for the future.

The \$1 Billion *State Your Purpose Campaign*, to be completed by 2020, is 91% of goal at this time. This campaign is moving CSU forward with "Purpose."

A physical revolution has taken place on the CSU Main and South Campuses and improvements have been made on the Foothills and Mountain Campuses. New buildings, infrastructure, transportation alternatives, thoughtful accessibility solutions, and innovative approaches have dramatically improved the campus functionality as well as beautified and enhanced the great vistas of Colorado and Fort Collins. This renovation is improving the educational, research and interaction facilities and opportunities for our students, alumni, donors, friends, faculty, and staff.

The new full time President and CEO of the CSU Foundation has the unique and exciting challenge and opportunity to take CSUF to "the next level" as an organization serving Colorado State and our donors. With total invested assets in excess of \$500 million for the first time in our history, CSUF's portfolio and approach is poised for even greater success in helping to provide improved financial resources for the University. In addition, there are numerous opportunities for expanded operational, systems, and financial management avenues to serve CSU and our donors.

As a select member of the CSU President's Cabinet, the CSUF President and CEO holds a University leadership position to help Dr. Frank and other Cabinet Members to guide CSU to greater impact. Being a part of this amazing team brings excellent senior level leadership experience to the next President and CEO.

The President and CEO also fulfills CSUF's role as a member of CSU Alumni Association and Board of Directors, having the opportunity to interact and connect with over 100,000 Alumni living in Colorado and at least another 100,000 around the country and globe. While there has been much improved connection with our Alumni in the last several years, the new Iris and Michael Smith Alumni Center (in the heart of the campus and next the new CSU Multipurpose Stadium) has provided and will continue to provide an excellent opportunity to make a significant difference in the quality and content of those interactions for the future.

A successful candidate in the President and CEO role has the opportunity to truly shape, enhance, and expand the strong record of operational excellence and wise investment management of CSUF and to impact the success of Colorado State University.

PRIMARY RESPONSIBILITIES

The President and CEO will

- maintain prudent, responsible, and proper management of funds entrusted to CSUF while meeting all University policies and all legal requirements, including being accessible to the University and donors at all times and having policies, processes, procedures, and expertise to meet their needs;
- provide reporting transparency of CSUF to CSU;
- manage, develop, and inspire staff, provide direction for day-to-day operational needs, and manage budgets;
- build out CSUF staff and capabilities to meet the needs of the broader university for the next 5-10 years and the foreseeable future;
- create succession plans and overlap in positions to address staff turnover and depth of the team;
- build and sustain a thoughtful and productive relationship between CSUF and the University, especially with the University President and Vice President of Advancement, bringing perspective and counsel as a member of the University's senior leadership team;
- support the Board of Directors as the strategic and fiduciary governing body of CSUF by reporting on the corporate affairs, so the Board is continually and fully aware of the state of CSUF and its activities;
- provide thoughtful management and expertise to the Board and Investment Committee (as well as senior University and System leaders, major donors, etc.) in achieving the highest investment returns possible while maintaining a prudent risk profile for the portfolio;
- develop and administer the short- and long-term plans and policies of CSUF to ensure sound economic stability and wise use of its assets, as well as the exercise of prudent fiduciary responsibility in all of its actions;
- oversee the timely and cost-effective use of various media and other resources to disseminate information about CSUF to constituents, including proactive and effective public relations;
- represent CSUF to various and diverse individuals and groups, including alumni, student families, community leaders, businesses, donors, board members, and government representatives;
- create and maintain relationships with CSUF affiliate organizations associated with various units of the University, working closely with the university deans/vice presidents of units served by the affiliates and the Alumni Association board of directors;
- assist the University President and senior administrators, and CSUF Board of Directors in building and nurturing long-term relationships and strong investment management results which yield significant support from major gift donors;
- collaborate with leaders of enrollment management, outreach, government relations, and business relations to build the University's image and engagement with its external constituencies and communities;
- guide and provide support as feasible to administrative and academic units in events planning and coordination;
- support creative donor strategies and facilitate new innovative gift strategies; and
- assure CSUF provides equal employment opportunities to its employees and potential employees as well as provides an atmosphere which embraces and encourages ethnic and cultural diversity, leading in the development of a culture which welcomes diversity in thought, experience, and background.

KEY COLLEAGUES



Anthony A. Frank
Chancellor, Colorado State University System

Tony Frank is the 14th president of Colorado State University, one of the nation's leading public land-grant research universities with nearly 35,000 students and more than \$332 million in annual research activity. Since his appointment to the presidency in 2008, he has overseen a period of record fund-raising and enrollment, rising graduation rates, increased diversity, improved campus infrastructure, and unprecedented research support. He was named Chancellor of the Colorado State University System on June 1, 2015.

President Frank earned his undergraduate degree in biology from Wartburg College, followed by a Doctor of Veterinary Medicine degree from the University of Illinois, and a Ph.D. and residences in pathology and toxicology at Purdue. Prior to his appointment as CSU's president in 2008, he served as the University's provost and executive vice president, vice president for research, chairman of the Pathology Department, and Associate Dean for Research in the College of Veterinary Medicine and Biomedical Sciences.

Dr. Frank serves on a number of state and national boards including the University Research Alliance, National Renewable Energy Laboratory External Advisory Council, the NCAA Division I Board of Directors, the National Western Stock Show Association Board of Directors, the Boettcher Foundation Board of Directors, the Denver Metro Chamber Board of Directors, and previously the Association of Public & Land Grant Universities Commission on International Initiatives. He is currently chair of the Mountain West Conference Finance Committee. He has served on federal panels including appointment by the U.S. Department of Commerce to the Deemed Export Advisory Council. He also has served on the editorial board of Toxicologic Pathology and as a member of the Colorado Climate Action Panel.

Professional and personal honors include induction into the Illinois and Colorado 4-H Halls of Fame; the regional Presidential Excellence Award from NASPA, the Student Affairs Administrators in Higher Education professional organization; and the 2010 Fort Collins Board of Realtors Citizen of the Year. He was awarded the Carl J. Norden Distinguished Teaching Award at both Colorado State and Oregon State University. Dr. Frank's research interests have included toxicologic and infectious disease pathology, and he has authored and co-authored numerous scientific publications.



Kim Tobin
Vice President for University Advancement

Kim Tobin joined CSU in 2003 and was appointed Vice President in 2017. As Vice President, she leads University development efforts and campaign initiatives, alumni and donor relations, University events, and other efforts to build the University's profile and relationship with donors, alumni, and key constituent groups.

Tobin began her tenure at CSU as the Director of Development for the College of Natural Resources (now the Warner College) before she went on to lead development efforts for the College of Liberal Arts for nine years. At Colorado State, she has extensive leadership experience in the Division of University Advancement, serving as Executive Director, Assistant Vice President, and Associate Vice President. She has previously served in development positions at Lakehead University and the University of Toronto. Born and raised in Canada, Tobin earned a Bachelor's of Arts from the University of Toronto and a Masters of Arts from Saint Mary's University of Minnesota. She is pursuing her Ph.D. in Higher Education Leadership at Colorado State.



Lynn Johnson

Vice President for University Operations, Chief Financial Officer

Lynn Johnson serves as Vice President for University Operations, overseeing administrative departments such as Facilities Management, Business and Financial Services, the Office of Budgets, Parking and Transportation Services, Purchasing, Environmental Health Services, Central Receiving and Mail Services, Human Resources, the Office of the Ombuds and Employees Assistance Program, Risk Management and Insurance, Training and Organizational Development, and the Office of Equal Opportunity. Johnson also serves as the liaison to the Administrative Professional Council and State Classified Personnel Council; oversees many University initiatives and programs such as Commitment to Campus, and Strategic Partnerships; and serves on the board of the Semester at Sea program. As CFO, her primary focus is to ensure the integrity of the financial processes and reporting of the University.

Johnson previously served as the University Controller and the Director of Business and Financial Services as well as the Director of Sponsored Programs. She obtained her Bachelor of Science degree in accounting from the University of Texas Arlington. Johnson is a Certified Public Accountant, spent several years in public accounting with KPMG, and served as the CFO for a non-profit cancer research center in Denver prior to joining CSU in 2003. Johnson lives in Loveland with her husband and has two sons—one is a graduate of CSU's College of Business and the other is a current student in CSU's Mechanical Engineering Program.



Mark Gill

Chief of Staff to the President

Mark Gill is the Chief of Staff to the President at Colorado State University. In this capacity, he is the senior staff assistant responsible for a broad range of support for the office, including oversight of all operations and ensuring effective implementation of initiatives on behalf of the President. Gill retired from the U.S. Air Force as a Colonel in 1998 after 26 years of active duty. During his career, Gill spent 17 years on flight status, worked under Colin Powell while serving at the Pentagon, and worked on the White House Staff as Deputy Director responsible for Presidential trip security and contingency planning. Gill is also chairman of the ROTC Advisory Board for CSU. He joined the University in 2002.



James A. Martell

Chair, Board of Directors, Colorado State University Foundation

Jim Martell has been with the Colorado State University Foundation Board since 1987 and has been Chair of the Board since 1991. Martell earned a Juris Doctor from Washington University School of Law after graduating with a Bachelor of Science degree in psychology from Colorado State University. He was admitted to the Colorado State and Federal Courts in October of 1977 and the United States Supreme Court in May of 1989. His law practice in Fort Collins focuses in the areas of Real Estate and Business. Martell is a third generation native Coloradoan.

Board of Directors, Colorado State University Foundation

Toby Cromwell

Toby Cromwell began serving on the CSUF Investment Committee in 2008 and was elected to the Board in 2009. He holds a B.S. degree in Economics and an M.B.A. degree from CSU, is a registered investment advisor, and has earned the 3, 7, 24, 63, and 65 securities licenses. He is President and Founder of Antora Capital Partners.

Scott Thisted

Scott Thisted began serving on CSUF's Investment Committee in 2010. In 2012, he was elected to the Board. He holds a B.S. degree in Business Administration from CSU and has earned the 7, 31, and 66 securities licenses. He joined Merrill-Lynch in 1998 and is now Managing Director-Wealth Management, Wealth Management Advisor/Global Wealth and Investment Management, and is a member of the Hoover-Thisted Team based in the Merrill-Lynch/Bank of America Cherry Creek office. Thisted received the CIMA designation in 2003.

Ric Thomas

Ric Thomas joined the Investment Committee in 2011 and was elected to the board in September 2017. He is a CSU alum and a chartered Financial Analyst. Thomas is Global Head of Investment Strategy and Research for State Street Global Advisors in Boston.

CANDIDATE QUALIFICATIONS AND QUALITIES

The successful candidate for the position of President and CEO should have

- proven and demonstrated integrity in dealing with every person in every transaction;
- passion for Colorado State University and its Land Grant Mission along with commitment and dedication to the purpose and mission of CSUF;
- extensive experience in and success leading and developing high quality interactions and relationships with individuals of all levels and/or a wide variety of constituents and leaders in various organizations and groups with multifaceted and multi-disciplinary goals and functions;
- extensive knowledge and experience in financial services and investment/asset management;
- a proven record of effective crisis management and/or acting wisely in difficult situations with ambiguous information;
- experience in the complex governing and operational environment of a dynamic non-profit organization, especially one in higher education;
- success in building teams, systems, operations, service standards, controls, and practices in operational management and/or financial management;
- a demonstrated record of having sound judgment in decision-making and interactions with others;
- strong oral and written communication skills;
- a thorough knowledge of the full spectrum of investment strategies, endowments, foundations, and charitable donations;
- the experience and ability to work effectively with university administrators, volunteer boards, and major donors;
- experience and/or knowledge of fundraising and all types of gift strategies;
- experience interacting with major donors; and
- a proven ability to develop and inspire a team of accomplished professionals.

A Bachelor's degree is required for this position as is a minimum of at least 7-10 years of successful leadership experience in a senior management capacity.

SALARY & BENEFITS

Colorado State University offers a competitive salary and benefits package.

LOCATION

Colorado State University is located in the city of Fort Collins, a dynamic community with a population of approximately 164,000. Situated 65 miles north of Denver at the western edge of the Great Plains and at the base of the Rocky Mountains, Fort Collins is a gateway to world class skiing, hiking, fishing, and biking. Fort Collins is known as “The Choice City” because of its proximity to the beautiful Rocky Mountains, excellent schools, 300+ days of sunshine yearly, thriving arts scene, eclectic shops and restaurants, and miles of walking and biking paths.

DIVERSITY AND INCLUSION

CSUF is dedicated to the principles of equal employment opportunity. It prohibits unlawful discrimination against applicants or employees on the basis of age 40 and over, race, sex, color, religion, national origin, disability, military status, genetic information or any other status protected by applicable state or local law. This prohibition includes unlawful harassment based on any of these protected classes.

Colorado State University is committed to embracing diversity through the inclusion of individuals reflective of characteristics such as: age, culture, different ideas and perspectives, disability, ethnicity, first generation status, familial status, gender identity and expression, geographic background, marital status, national origin, race, religious and spiritual beliefs, sex, sexual orientation, socioeconomic status, physical appearance, medical diagnosis, documentation status, and veteran status with special attention given to populations historically underrepresented or excluded from participation in higher education. The University’s commitment to diversity is a longstanding one that reflects its role and mission as a land-grant institution.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. Before submitting your materials, please read them over for accuracy. Review of applications will begin immediately and continue until the successful candidate has been selected.

To nominate a candidate, please contact Don Hasseltine:
donhasseltine@aspenleadershipgroup.com.

All inquiries will be held in confidence.



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