



EXECUTIVE VICE PRESIDENT FOR FINANCE AND ENTERPRISE BUSINESS DEVELOPMENT

THE ASPEN INSTITUTE

Location – Flexible (United States)



The Aspen Leadership Group is proud to partner with the Aspen Institute in the search for an Executive Vice President for Finance and Enterprise Business Development (EVP).

The EVP is the Chief Financial Officer of the Aspen Institute—a critical role ideally suited for a mission-driven, entrepreneurial leader who can drive organizational development and innovative financial management. The EVP will serve as a key partner to the President and CEO in developing the strength, aspirations, and sustainability of the Institute. The EVP is a member of the Institute’s Senior Executive Team (SET)—which leads all strategic, operational, and management functions of the Institute—and works closely with members of the Board of Trustees.

The EVP leads the Institute’s Finance department and supervises the Vice President for Finance. The department has 25 staff and oversees the Institute’s fiscal, budgetary, accounting, and audit processes, ensuring compliance with all legal and regulatory standards applicable to a 501(c)(3) tax exempt organization, and providing overall advice and support to the Institute to enable the strategic management of its financial resources.

Specifically, the department:

- oversees the development of the Institute’s annual budget and projections, reviewing inputs from all programs and departments to ensure accuracy and prudent financial management;
- oversees the Institute’s annual fiscal audit by ensuring all transactions are accurate and correctly recorded, and are supported by required backup documentation;
- oversees the Institute’s \$300 million+ endowment, investment, and cash portfolio;
- processes requests for payment to vendors, ensures internal controls are properly followed for more than \$100 million in transactions annually, and manages nearly \$10 million in credit card processing—and other online payment tools—for incoming payments;
- provides direct fiscal support to 50+ programs, and nearly 20 administrative departments, helping them manage, track, and analyze their finances and individual budgets;
- works with internal clients to design, develop, and implement standardized program reports, and develops financial and organizational dashboards for the SET and Board of Trustees;
- provides training to staff on key financial systems and processes; and
- records charitable contributions, manages payroll, and oversees the general ledger.

In addition to supervising this key function, the EVP:

- leads or coordinates enterprise-level business development projects designed to grow existing sources, and identify new sources of unrestricted revenue (outside of philanthropic activities) to support the Institute’s operating budget and enable investment in new capabilities and initiatives;
- leads in the evaluation of and adjustments to the Institute’s overall fiscal model and compensation strategies in partnership with the Vice President for People and Culture;
- helps to evaluate and implement new strategic business and revenue opportunities, as well as new efficiencies;
- supervises—or coordinates closely in the supervision of—additional functions, such as information technology and/or Washington, D.C. and New York facilities and workplace services;
- serves as Corporate Treasurer, staffs three Board committees (Finance, Investment, and Audit and Risk), and coordinates closely with the Facilities Committee; and
- provides hands-on financial leadership for major or emerging projects of internal or external significance. Some key initiatives include the Institute’s new partnership with Salamander Hotels and Resorts to manage its Aspen Meadows campus; the growth and sustainability of the new Resnick Center for Herbert Bayer Studies in Aspen; the development of market strategies for a major new online tool for assessing youth leadership development; and the Institute’s exploration of new partnerships and growth opportunities for live events.

ABOUT THE ASPEN INSTITUTE

The Aspen Institute is a global nonprofit organization committed to realizing a free, just, and equitable society. Founded in Aspen, Colorado in 1949 as the Aspen Institute for Humanistic Studies, the Institute drives change through dialogue, leadership, and action to help solve the most important challenges facing the United States and the world. It brings together thoughtful people with diverse backgrounds and points of view; cultivates and supports values-based, purpose-driven leaders in many communities; and turns ideas into action and impact for individuals and society. The Aspen Institute has earned a reputation for gathering diverse, nonpartisan experts, creatives, scholars, and grassroots leaders to address some of the world’s most complex problems. Its goal is always to have an impact beyond the convening space, and to provoke, further, and improve actions taken in the world.

With its Washington, D.C. headquarters, Aspen campus, network of international partners, more than 500 staff, and dozens of programs, the Aspen Institute has significant reach, vast networks, and a track record of success. Its 20+ Policy Programs use the tools of convening, leadership development, network building, practice sharing, and collective impact to drive change in crucial issue areas—ranging from educational excellence to economic opportunity, and from climate change to national security. Its Leadership Programs and the fellowships of the Aspen Global Leadership Network cultivate the next generation of values-based, purpose-driven change-makers across sectors, and ground their work in the Executive Seminar—which dates to the Institute’s founding. Its Public Programs—anchored by the signature Aspen Ideas Festival—bring people together to elevate breakthrough ideas and inspire progress on the most pressing challenges facing our world.

This scope and depth—developed over decades of growth and innovation—has afforded the Aspen Institute an international reputation for excellence in dialogue, convening, leadership development, and the amplification of transformational ideas. In the coming years, the Institute seeks to build on this

foundation by elevating, enhancing, and integrating its strongest assets in pursuit of even deeper impacts for people and communities.

Recently, the Institute has launched new initiatives focused on addressing the climate crisis, criminal justice reform, economic inclusion, grassroots and community leadership, empowering young people, and more. In the Roaring Fork Valley of Colorado—where the Institute was founded and where it maintains its Aspen Meadows campus—it has broadened its partnerships with the local community through the Hurst Community Initiative, and has deepened its connection with its aesthetic and cultural heritage through the creation of a \$20 million educational facility and creativity corridor, including the newly-constructed Resnick Center for Herbert Bayer Studies—which houses the Institute's growing Bauhaus art collection. To respond to one of the most urgent challenges of our time, the Institute created the Aspen Partnership for an Inclusive Economy (APIE) in 2019 which is anchored by a \$26 million commitment from Mastercard and an \$11 million investment from Prudential. Through APIE, the Institute is bringing together its networks and programs with a diverse range of public, private, and nonprofit leaders to help reconstruct the global economy so that it drives greater security, opportunity, and resilience for all. In May 2022 (and for three years thereafter), the Institute will partner with the City of Miami Beach to host the Aspen Ideas: Climate, an inclusive multi-day event focused on global and local solutions to the climate crisis that will bring together policymakers, scientific experts, business leaders, innovators, artists, young leaders, and the public.

In these undertakings, as in all of its efforts, the Aspen Institute possesses a deep sense of humanistic optimism and the motivation it fuels to make a difference. It does its work because it is committed to driving change toward a free, just, and equitable society. That is its purpose, and it pursues it relentlessly in everything it does.

REPORTING RELATIONSHIPS

The Executive Vice President for Finance and Enterprise Business Development will report to the President and Chief Executive Officer, Daniel R. Porterfield. In their management capacity, the Executive Vice President will empower and motivate staff through active communication, coaching, and honest and constructive feedback with an unwavering commitment to diversity, equity, and inclusion and its value to successful teams and organizations.

FROM THE PRESIDENT AND CEO

The search for our next Executive Vice President for Finance and Enterprise Business Development could not come at a more pivotal time—for the Institute and for society—and I believe the opportunities for difference-making through this position are truly unique across the nonprofit sector.

This crucial role will serve as a partner to me, as President and CEO, in leading a financial and business development strategy for the Aspen Institute that enhances our already strong reputation and brand, effectively supports our expansive and influential programs, grows our nearly unparalleled network of partners and supporters, and enables us to develop transformational new concepts and opportunities to drive social change at a time of profound need for our country and the world. We are seeking—and I am excited to work with—a financial and operational leader with the energy, creativity, ambition, and vision to help take our work to the next level of impact.

The ideal candidate for this position will be an outstanding finance professional, organizational leader, and strategist with a demonstrated track record of budget oversight and management for a nonprofit of

our size, scope, and complexity. We will work together to scale the success and resources of the Institute, develop a comprehensive, forward-looking financial and operational strategy, and enhance the organization's ability to develop and fund extraordinary work that makes a difference for people and communities all around the world.

Thank you for your consideration of this singular and exciting opportunity.

–Daniel R. Porterfield, President and CEO

THE ASPEN INSTITUTE'S COMMITMENT TO DIVERSITY, EQUITY, INCLUSION, AND ANTI-RACISM

The Aspen Institute was founded in 1949 in a moment of humanistic optimism after a period of world war, genocide, and nuclear devastation. In the year after its founding, its first trustees stated that the essence of the Institute's ideals "is the affirmation of [human] dignity."

The Aspen Institute's enduring purpose, in the service of human dignity, is to drive change toward a free, just, and equitable society—domestically and around the globe. This requires it to live the values of diversity, equity, inclusion, and anti-racism in everything it does.

Fulfilling its mission also means working to better understand and acknowledge America's long history of racism and systemic injustice and embrace its responsibility to address and transform these realities, both within the organization, and in society at large. It must continually examine its history, internal culture, and practices, and be committed to holding itself accountable. Its mission calls on it to recognize, value, and celebrate the identities, experiences, agency, and perspectives of all people. By fostering a community of diverse talents, voices, and backgrounds—which requires constant commitment—it lives and renews its mission and values.

To achieve its mission, the Institute commits to working proactively to advance the principles of diversity, equity, inclusion, and anti-racism across its myriad endeavors—from program design, policy development, convenings, network-building, and leadership initiatives to internal matters, such as the recruitment, compensation, training, and advancement of staff.

This commitment is both deeply enriching and unavoidably challenging, requiring inclusive dialogue, open-mindedness, reflection, evaluation, and change on profound matters of identity and justice. The steps needed for progress are not always clear, and people of principle may not always agree about the best path forward. Bias, privilege, power imbalances, racism, and discrimination are pervasive factors that can be difficult to confront—within society, within institutions, within others, and within ourselves. Meeting this challenge requires leadership, staff, and all members of the community to engage thoughtfully with one another and always promote diversity, equity, inclusion, and anti-racism. Doing so enhances both the impact of the Institute's work and the quality of the workplace.

As a result, the Institute understands that living its commitment to diversity, equity, inclusion, and anti-racism is not work for one time, but for all time—for the good of all, and in service to the enduring mission of the Aspen Institute. It embraces this commitment to addressing injustices with humility, optimism, and determination—now and always.

PRIMARY RESPONSIBILITIES

Institutional Leadership

The Executive Vice President for Finance and Enterprise Business Development will

- partner with the President and CEO and the Senior Executive Team (SET) on all aspects of the Institute's mission, strategy, finance, and operations;
- in coordination with and through the supervision of the Vice President for Finance, lead the Institute's Finance department and all aspects of the Institute's processes for budget development, financial strategy, investments, fiscal tracking and reporting, and expense management;
- staff the Board Finance, Investment, and Audit and Risk Committees, and coordinate with the Facilities and Executive Committees;
- partner with the SET on the Institute's financial management, budgeting, new business development, compensation approaches, DEI commitments, strategic partnerships, and more;
- serve as a key partner in the exploration, design, and launching of major concepts and strategic initiatives, particularly by crafting the business and financial structures to enable their success;
- work with the President and CEO, SET, Board of Trustees, and program leaders to develop major or emerging revenue-generating opportunities;
- provide timely, accurate, and complete reports to the President and CEO, SET, Board of Trustees, and other stakeholders;
- help foster a culture of financial literacy at the Aspen Institute; and
- provide training and staff development opportunities to staff as warranted.

Additional Leadership and Management Responsibilities

The Executive Vice President for Finance and Enterprise Business Development will

- oversee overall fiscal management for the Institute, including accounting; annual budget preparation; reporting; payroll and cash management; investments and audit; and contract compliance;
- oversee the coordination and activities of independent auditors and the preparation of the annual financial statements and footnotes, Form 990 tax filings, and other regulatory reporting;
- oversee administration and financial reporting of the organization's 403(b) Plan, insurance plans, and health care coverage administration and analysis;
- conduct treasury management, including commercial and merchant accounts, trusts, cash management, and lines of credit;
- hold fiduciary responsibility for administering restricted and endowed gifts;
- oversee management of foundation and government grants, including funder reporting, audit accountability, direct and indirect expense allocation, and A-133 audit requirements;
- be responsible for all state and federal tax reporting requirements, as well as personal property, payroll, and fringe benefit plans;
- supervise the Vice President for Finance and coordinate closely with them on all of the above; and
- oversee, or coordinate closely in the oversight of the Institute's information technology team and systems, real estate leases, and office services for the Institute's Washington, D.C., and New York facilities and workplace services.

LEADERSHIP AND KEY COLLEAGUES

Daniel R. Porterfield

President and Chief Executive Officer

Daniel R. Porterfield is President and CEO of the Aspen Institute. He has been recognized as a visionary strategist, transformational leader, devoted educator, and passionate advocate for justice and opportunity. At the Aspen Institute, Porterfield has worked to build upon the organization's legacy of societal influence and commitment to human dignity while positioning it for a future where it can make its most profound and lasting impacts.

Prior to leading the Aspen Institute, Porterfield served for seven years as the President of Franklin & Marshall College, a national liberal arts college founded by Benjamin Franklin in 1787. Under his leadership, Franklin & Marshall set records for applications, fundraising, and fellowships; developed cutting-edge new centers for student wellness, career services, and faculty excellence; and constructed a new athletics stadium and visual arts center.

Porterfield led Franklin & Marshall in the development of the Next Generation Initiative talent strategy, through which the College strengthened its academic excellence and competitiveness by tripling its percentage of incoming low-income students and more than doubling its percentage of domestic students of color. For this work, Porterfield and Franklin & Marshall received national recognition and visibility, including high-profile coverage in *The Washington Post* and *The New York Times*, on the PBS NewsHour, and at several White House summits of educational leaders. The Next Generation Initiative also helped to galvanize the creation of a national project of the Aspen Institute's College Excellence Program, the American Talent Initiative (ATI). Funded by Bloomberg Philanthropies, the ATI has a national goal of enrolling 50,000 more high-achieving low-income students in leading institutions by 2025.

Before assuming the presidency at Franklin & Marshall, Porterfield served as Senior Vice President for Strategic Development and as an award-winning professor of English at his alma mater, Georgetown University. In this role, he led Georgetown's institutional positioning, strategy formation, communications, government relations, community relations, and intercollegiate athletics. He also spearheaded the University's relationship with Washington, D.C. Public Schools and founded a number of Georgetown programs for immigrant children, D.C. students, and marginalized youth.

Prior to coming to Georgetown in 1997, Porterfield served for four years as Communications Director and Chief Speechwriter for the U.S. Secretary of Health and Human Services.

Porterfield has received awards and recognitions from the KIPP Foundation, the "I Have A Dream" Foundation, the Posse Foundation, and the Kaplan Educational Foundation. He serves on the National Board of Directors of Teach For America and on the board of the Education Trust and is a former trustee of the College Board. He was named a White House Champion of Change in 2016 and was elected to the American Academy of Arts and Sciences in 2020.

Porterfield earned B.A. degrees from Georgetown and Oxford—where he was a Rhodes Scholar—and his Ph.D. from The City University of New York Graduate Center, where he was awarded a Mellon Fellowship in the Humanities and wrote his dissertation on the poetry of American prisoners. He has been awarded honorary degrees from Wake Forest University, Miami Dade College, Queens University of Charlotte, Elizabethtown College, and Mt. Aloysius College.

A native of the City of Baltimore, where he was raised by a single mother at the height of the civil rights movement, Porterfield and his wife, attorney Karen A. Herrling, live in Virginia and have three children.

Elliot Gerson**Executive Vice President for Policy and Public Programs and International Partners**

Elliot Gerson is the Executive Vice President at the Aspen Institute responsible for its Policy Programs, its Public Programs, and its relations with its International Partners. The Institute's more than 30 Policy Programs focus on both domestic and international issues. They foster candid dialogue among leaders and policy experts, advocate new policy, and have enormous impact on the ground. The Institute's public programs—including the Aspen Ideas Festival, the Aspen Security Forum, CityLab, and many smaller programs across the country and world—open the Institute's doors to a broader audience and further both its educational goals and its promotion of ideas that lead to action. The Institute has International Partners based in the Czech Republic, France, Germany, India, Italy, Japan, Mexico, New Zealand, Romania, Spain, and Ukraine.

Gerson also administers the U.S. Rhodes Scholarships. He was a Rhodes Scholar at Oxford; a US Supreme Court clerk; practiced law in government, and privately; held executive positions in state and federal government, and on a presidential campaign; and was president of start-ups in health care and education, and of two leading national insurance and health-care companies. He has served on many non-profit boards, especially in the arts.

David Langstaff**Executive Vice President for the Leadership Division**

David Langstaff serves as Executive Vice President for the Leadership Division of the Aspen Institute, having served in an interim capacity from March 2018 through October 2019. The Leadership Division houses the Aspen Global Leadership Network; Executive Leadership and Justice and Society Seminars; the Office of Curriculum and Moderators; and Weave: The Social Fabric Project. Langstaff has been actively involved with the Aspen Institute for more than twenty years as a moderator of values-based leadership seminars and as Chairman of the Advisory Board of the Business and Society Policy Program.

Langstaff currently is a director of Premier, Inc. (NASDAQ: PINC) where he serves on the Audit, Nominations and Governance, and other committees. He serves as Chairman of the Board of Idemia-National Security Solutions and is a Director of Boston Dynamics. Langstaff is a Trustee of the Committee for Economic Development and a Director of the Wolf Trap Foundation. In 2009, Langstaff was named Chairman of the Board of Directors of TASC, Inc., and later served as President and Chief Executive Officer until 2013. Previously, he was Founder, President and Chief Executive Officer, and Director of Veridian Corporation, which he took public in 2002 (NYSE: VNX). Langstaff served as Chief Financial Officer, Chief Operating Officer, and Chief Executive Officer of predecessor companies of Veridian since 1984. Langstaff also has served in executive positions and as a director of other private and public companies, and as a Special Advisor to General Atlantic, LLC. Langstaff served as a member of the Board of Directors of The Hitachi Foundation, was a member of the Defense Business Board, and has served on the boards of a number of community, arts, and educational institutions.

Langstaff performs from time to time as a baroque soloist with amateur and professional orchestras and was Executive Producer of the Emmy- and Grammy-nominated, eight-episode PBS television special on the history of recorded music called *Soundbreaking*, with Sir George Martin. He earned a B.A., *cum laude*, from Harvard University and an M.B.A. from Harvard Graduate School of Business Administration. He resides on a farm in Comus, MD with his wife of more than forty years.

Cynthia McKee**Executive Vice President for Institutional Advancement**

Cynthia McKee serves as Executive Vice President for Institutional Advancement at the Aspen Institute. In this role, she leads fundraising and donor relations through oversight of the Office of Institutional Advancement, which includes principal, major, and planned gift fundraising; corporate and foundation

relations; annual giving and membership programming through the Society of Fellows; major events; and Advancement Communications. She also serves as a strategic partner to programs across the Institute in supporting program-led and program-specific fundraising and partnerships.

McKee has extensive experience in fundraising, campaign strategy and execution, and donor development. She previously served as Senior Vice President for Development at the global nonprofit organization, Conservation International (CI), where she worked directly with CI's Board of Directors, CEO, and senior leadership to ensure the organization's high impact conservation goals were securely funded. She led CI's highly successful \$1.1 billion People Need Nature campaign which concluded in 2020.

Before joining CI in January 2011, McKee was the Director of Development and Marketing for the National Fish and Wildlife Foundation (NFWF), where she was responsible for developing the organization's fundraising and marketing strategy and leading efforts to secure private sector gifts to leverage multimillion dollar public funds.

Previous to NFWF, McKee worked with the board and high-net-worth individuals at Special Olympics, and before that, she was Director of Principal Gifts at The Nature Conservancy where she launched their principal gifts program to bolster its US \$1.4 billion Campaign for Conservation. McKee has also served in the major gifts departments at World Wildlife Fund and the Pan American Development Foundation at the Organization of American States. She began her career as a political fundraiser.

James S. Crown

Chair, Aspen Institute Board of Trustees

James S. Crown is Chairman and Chief Executive Officer of Henry Crown and Company, a privately owned company which invests in public and private securities, real estate, and operating companies. He is chairman of the Aspen Institute, and trustee of the Museum of Science and Industry and the University of Chicago. He serves as lead director of General Dynamics Corporation and is a director of JPMorgan Chase. Crown is a member of the Illinois State Bar Association and the American Academy of Arts and Sciences, and a former member of the President's Intelligence Advisory Board appointed by President Barack Obama. Crown was born in Chicago in 1953, the son of Lester and Renée (Schine) Crown. He earned a B.A. in political science in 1976 from Hampshire College in Amherst, Massachusetts. He received his law degree in 1980 from Stanford Law School, where he was projects editor of the Stanford Law Review and a member of the Stanford Public Interest Law Foundation. Upon graduating from law school, Crown joined Salomon Brothers Inc., in New York City, as an associate. He became a Vice President of the Capital Markets Service Group in January 1983. In April 1985, he returned to Chicago to join his family's investment firm. Crown has been married to the former Paula Hannaway since 1985. He and Paula have four children.

L. Brooks Entwistle

Aspen Institute Trustee and Chair, Finance Committee

Brooks Entwistle is the SVP of Global Customer Success, and the Managing Director for APAC and MENA at Ripple. Prior to joining Ripple, he served as Chief Business Officer International for Uber, responsible for business development and the firm's relationships across Asia Pacific, EMEA, and Latin America. Previously, he was the CEO of Everstone Capital, a premier India and Southeast Asia focused private equity and real estate investment firm. Before joining Everstone in 2014, Entwistle was a Partner at Goldman Sachs where he spent 22 years in various capacities, including 15 years based in Asia. Most recently, he was Chairman of Goldman Sachs South East Asia as well as CEO of Goldman Sachs Singapore. Prior to this, he spent 5 years in Mumbai as CEO and Founder of Goldman Sachs India where he was responsible for leading and building the firm across all divisions. He also served as the Founder & Co-

Head of Goldman Sachs Asia's High Technology Group. Earlier in his career, Brooks served as a District Electoral Supervisor with the United Nations Transitional Authority in Cambodia (UNTAC).

Brooks holds a bachelor's degree from Dartmouth College and a master's degree in Business Administration from Harvard Business School. He is currently a trustee of the Aspen Institute, EmancipAction, The John Sloan Dickey Center for International Understanding at Dartmouth College, and Young Life.

An avid mountaineer and big mountain skier, Brooks is the oldest American to summit and ski an 8,000-meter peak, Cho Oyu in Tibet in 2016. He also summited Everest from the North Side in Tibet in 2017 in a guided climb record 27 days.

PREFERRED COMPETENCIES AND QUALIFICATIONS

The Aspen Institute seeks an Executive Vice President for Finance and Enterprise Business Development with

- a deep commitment to the values, ethos, history, and mission of the Aspen Institute;
- experience leading successful multi-year budget planning and management for large, complex organizations with global reach;
- experience and proven success leading a high-performing finance team at an organizational level;
- success as an engaged leader, collaborator, and communicator within a complex organization and with a highly engaged Board of Trustees and other stakeholders;
- outstanding oral and written communication skills;
- a record of success in financial modeling and in exploring, developing, and institutionalizing new business and revenue opportunities; and
- experience leading diverse teams and promoting an equitable and inclusive environment where all team members are valued, and have clear roles and responsibilities aligned to team goals.

A bachelor's degree is required for this position as is at least fifteen years of management experience, ideally in a complex nonprofit or other mission-driven environment.

SALARY AND BENEFITS

The Aspen Institute offers a competitive salary and [benefits package](#).

LOCATION

The location for this role is flexible within the United States, with the expectation of regular travel to the Institute's Washington, D.C. office. The Executive Vice President will occasionally work from the Institute's campus in Aspen, Colorado—especially in the summer—or travel for Institute meetings and events.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. ***Cover letters should be responsive to the mission of the Aspen Institute as well as the responsibilities and qualifications presented in the position prospectus.*** Review of applications will begin immediately and continue until the successful candidate has been selected.

To apply for this position, visit:

[*Executive Vice President for Finance and Enterprise Business Development, The Aspen Institute.*](#)

To nominate a candidate, please contact Ron Schiller:

[*ronschiller@aspenleadershipgroup.com.*](mailto:ronschiller@aspenleadershipgroup.com)

All inquiries will be held in confidence.