



**Position Profile  
Executive Director  
Boston, Massachusetts**

**The Opportunity**

United for a Fair Economy (UFE) is seeking a highly experienced, dynamic, strategic thinking and culturally-competent Executive Director who is passionate about working for economic justice and supporting social movements for greater equality. For its next Executive Director, UFE is looking for someone who is committed to working within a democratic and participatory team management model, has a facilitative and consensus-building leadership style, and can help take UFE to its next level of growth and development.

UFE was founded in 1994 to address the problem of growing inequality in the US, and its mission is to raise awareness that concentrated wealth and power undermine the economy, corrupt democracy, deepen the racial divide, and tear communities apart. UFE supports and helps build social movements for greater equality.

The organization seeks to build a broad movement for economic justice and supports the health and growth of social change organizations and individuals so they can act powerfully and strategically. UFE serves movement building through efforts that change public attitudes, teach critical thinking skills, provide an analytical framework, broaden the base through addressing race and racism, organize people of wealth as a political force, and build networks by linking policy work and grassroots organizing.

UFE is a mission-driven organization that has developed a democratic, highly participatory staff management and shared governance model that are clearly aligned with its core values of democracy, equality, mutual accountability, and meaningful participation.

Women and people of color are especially encouraged to apply. The executive search is being conducted by Third Sector New England Transition Consultant, Judy Freiwirth, Psy.D. See [www.tsne.org/etp](http://www.tsne.org/etp).

**Organizational Overview**

UFE provides information and analysis infused with common sense and humor that demystifies the economy and inspires people from all walks of life to take action. UFE has built a strong foundation for effecting real change by shedding light on the growing economic divide, helping people understand its causes, and facilitating action for policy reform.

UFE's goals are to close the growing wealth divide, to change the rules that tilt tax benefits increasingly toward the wealthy, to spotlight the role of race in economic inequality, and to serve as a forum where different races, different cultures, and people with varying degrees of wealth can come together to work for economic justice.

UFE places a high emphasis on its communications work, and therefore reaches beyond the converted to expand the public conversation and influence debate on economic justice issues. In addition to the annual *State of the Dream* report, UFE publishes a report every Labor Day about CEO pay, entitled *Executive Excess*. Through its reports, press advisories, press releases and outreach, UFE gets an average of about 600 media "hits" per year. UFE's monthly e-newsletter, which spotlights topical events and issues, has about 12,000 subscribers. UFE also publishes a semi-annual newsletter of general interest (*Fair Play*) and two other newsletters geared toward specific constituents: *Responsible Wealth Action News* and *Tax Fairness Action News*.

UFE has recently transformed its governance model to a "System-Wide Governance" <sup>TM1</sup> framework, an innovative approach built upon principles of inclusiveness, participatory democracy, constituent leadership, and genuine partnership. In this model, governance responsibility is shared across the organizational system among the key sectors of an organization, including its constituents, staff and board. As part of that transformation, UFE has recently reconstituted its board composition to one comprised of a racially diverse group of its key constituents, in alignment with the new governance model. It is also in the process of involving other constituents in meaningful governance decisions.

UFE has a budget of about 1.5 million and there are currently a diverse staff of 12 full time and 1 part time staff. Biographies of UFE's talented staff and board members can be found at: [www.faireconomy.org/about\\_ufe/who\\_we\\_are](http://www.faireconomy.org/about_ufe/who_we_are). UFE's national office and the executive director position are located in Boston, Massachusetts.

## **UFE's Programs**

With a staff of twelve and the invaluable contributions of a multitude of members, a large intern program, and volunteers, UFE has a national reach through its advocacy work, workshops, trainings, partnerships and communications/media work. UFE's current work is focused in four major areas: the Racial Wealth Divide; Fair Taxation; Popular Economics Education; and Responsible Wealth.

### **A. The Racial Wealth Divide and Asset Building**

No matter how the economy is doing, a racial gap remains. This gap will not be erased without addressing the *wealth* gap, and not just the *income* gap. In fact, the current recession and sub-prime mortgage disaster have served to worsen economic inequality. The Racial Wealth Divide program brings awareness and deepens understanding about the historical and contemporary barriers to wealth creation among communities of color. UFE develops and promotes a

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<sup>1</sup>Freiwirth, Judy. "Engagement Governance for System-Wide Decision Making." *The Nonprofit Quarterly*. Summer, 2007. and; Freiwirth, Judy & Letona, Maria Elena "System-Wide Governance for Community Empowerment". *The Nonprofit Quarterly*. Winter, 2006.

comprehensive analysis of economic inequality by: 1) generating public conversations about the policies and programs that created and widen this divide; and 2) bringing grassroots voices to the asset-policy-making tables. UFE has made significant progress in establishing a base for national policy change through many avenues, including: media and publications; partnerships with groups ranging from grassroots organizations to policymakers and legislators; using the voices of UFE's Responsible Wealth members; and informing asset policy discussions. Moreover, by bringing those most affected by these policies to the table of the rules-makers, UFE has elevated civic participation in the dynamic process of democracy.

UFE released its 6<sup>th</sup> *State of the Dream; The Silent Depression* report in January 2009. The report - based on extensive research includes a critique of mainstream economic analysis and posits a new framework for evaluating economic well-being. The report is the first of its kind to do a thorough analysis of the historical reasons for the disparity in economic realities between whites and people of color, and to suggest steps toward remedying the problem. UFE's 2008 State of the Dream report analyzed the sub-prime lending debacle and its disastrous effect on communities of color. The report was covered in over 200 media outlets, including newspapers, radio shows and blogs.

## **B. Fair Taxation Program**

UFE's fair tax program helps build a national constituency to restore progressive taxation as an important means of reversing the trend toward growing economic inequality. The power of its work on taxation is based on years of awareness raising, mobilizations, and cultivating allies. UFE has two major taxation initiatives: 1) the Tax Fairness Organizing Collaborative, and 2) our work to preserve the estate tax.

### **Tax Fairness Organizing Collaborative**

In 2004, UFE created the Tax Fairness Organizing Collaborative (TFOC) to fill a major void in the economic justice movement: a national network of state level grassroots groups educating and organizing for progressive taxation. The goals are: 1) tax policy that is progressive, transparent and generates enough revenue to fund quality public services and provide opportunities that enable all people to thrive; 2) to challenge the status quo notions of representation and leadership so that there is comprehensive participation of people at the grassroots level in the political change processes; and 3) collaboration, communication and problem solving with peer organizations to advance the work and strengthen the movement for economic justice.

Over the last two years, with UFE as its anchor, the TFOC has made significant strides in its growth as a network, both in breadth and depth. It has grown from 18 member organizations in 18 states to 26 member organizations in 23 states. TFOC members have played a leading role preventing passage of anti-tax legislation and referenda in more conservative states, and pushing the envelope with new reforms/ideas in comparatively progressive states.

### **Estate Tax**

Since 1999, UFE has been fighting permanent repeal of the federal estate tax, our nation's only tax on wealth. UFE makes an impact on this issue through its treasury of reports, op-eds, targeted lobbying in key states, relationships with non-profit organizations and coalitions, and mobilization of wealthy supporters of the estate tax. Although UFE has been successful in

defeating the permanent repeal of the estate tax, under current law it is slated to be temporarily repealed in 2010 for one year. As the date approaches, there are ongoing efforts to reform the tax; UFE has been educating and mobilizing in order to ensure the best reform possible. UFE's 501 (c) 4 affiliate, the Fair Economy Action Fund, is promoting the McDermott bill, a bill introduced to responsibly reform, not repeal the estate tax, with the expectation of passing legislation in 2009.

### **C. Popular Economics Education: Education for Action**

One of UFE's primary roles is to educate and to make the 'rules' of the economy visible using people's lived experiences. UFE's popular education workshops engage people in thinking critically about their relationship to the economy. This allows individuals to create a new story for themselves and their communities and provides a framework for taking action to make change. Demand remains great for UFE's flagship workshop, *The Growing Divide: Economic Inequality and the Roots of Insecurity* in religious congregations, unions, community organizations, business associations and student groups across the country. Using popular education, UFE also offer workshops and trainings that deepen the analysis of inequality by looking more closely at: the global economy and the forces driving migration; the impact of militarism on the US economy; tax fairness; and the racial wealth divide. UFE's Education Team also holds regular Trainings of Trainers in English and Spanish to build the capacity of community-based organizations around the country,

### **D. Responsible Wealth**

UFE's Responsible Wealth project is a surprising and welcome voice for economic fairness. This network of over 750 business leaders, investors and other wealthy people uses its collective access and unique voice to advance economic justice. Responsible Wealth members promote shareholder activism and speak out for fair taxation. They are in the forefront of UFE's efforts to preserve the estate tax. Every year, some members of Responsible Wealth sign the Tax Fairness Pledge that redirects their tax cuts to tax fairness organizing efforts. Some of the accomplishments include:

- In conjunction with UFE's 501 (c)(4) organization, Fair Economy Action Fund, Responsible Wealth members participated in our annual estate tax education and lobby days in Washington, DC in March 2008.
- Over the past two years, Responsible Wealth has filed shareholder resolutions at Wells Fargo Bank (regarding racial disparities in the company's sub-prime mortgage lending) and Western Union (concerning the company's costly fees and exchange rates for remittances sent by immigrants to their home countries).
- Responsible Wealth members will also be co-filing a number of "Say on Pay" resolutions in 2009, seeing the right of shareholders to vote on CEO pay packages. Although UFE has been addressing CEO pay for over a dozen years this issue is finally coming to a public crescendo as a result of the current bailout negotiations.

## **Strategic Opportunities and Challenges for the New Executive Director**

### **UFE's Leadership in the Addressing the Current Economic Crisis**

The current economic crisis and the government bailout for the failing US financial sector have made economic inequality and the structures that perpetuate its growth much more visible. In

this current political context, UFE has a unique opportunity to demonstrate leadership on these issues, offer a political analysis and solutions, and contribute significantly to building a broad movement for economic justice.

### **UFE's Strategic Planning**

UFE is currently undergoing a strategic planning process to help set its directions for the next few years. The new Executive Director will be an important contributor to this process, in collaboration with board, staff and constituents.

### **New Staff Leadership/Management Model**

Over the past year the UFE staff has been developing a new staff management model along the principles of democracy, meaningful participation, and mutual accountability. The model is a team-based structure that is led by the Management Team. The Executive Director, who plays a key role within the Management Team, will need to demonstrate facilitative leadership in assisting the organization reach its next level of implementation.

### **New Governance Model**

The Executive Director will assist in implementing UFE's new System-Wide Governance model, ensuring effective partnerships between the board, staff and key constituents. The ED will also play an important role in the ensuring the successful contributions of the newly formed Board-staff-Constituent teams.

## **Profile of the Ideal Candidate**

### **Skills, Competencies, Experience**

- Demonstrated, successful experience and commitment to managing within a democratic, participatory-team leadership model and/or self-managed team structure
- Ability to work within and commitment to a cutting-edge, non-traditional shared governance model
- At least 10 years of senior nonprofit management, financial oversight, and operations experience, preferably with progressive organizations
- Proven track record of successful fundraising from individuals and foundations; able to strengthen current and develop new funder relationships that advance UFE's mission.
- Excellent strategic thinking and planning skills
- Excellent facilitation skills, that builds consensus
- Solid follow-through and implementation abilities
- Skilled in dealing with issues of race, power and class
- Effective public speaking skills
- Experience developing leadership and ownership within staff
- Demonstrated understanding of and commitment to organizing and movement building
- Excellent relationship building and interpersonal skills
- Experience as an Executive Director preferred
- Knowledge of economic justice issues and popular education is preferred
- Computer literate and Bachelors Degree required

## **Management Style**

- Demonstrated successful experience and commitment to democratic, participatory team management and leadership models; ability to build consensus
  - Facilitative leadership style that encourages both meaningful participation and ensures accountability
  - Ability to recognize and effectively enhance the leadership and skills of staff
  - Ability to encourage and maintain a genuine partnership and transparent communication between and among the board, staff, and constituents
  - Culturally-competent management style, integrating issues of race, gender, class and power
  - Encourages innovation, best practices, and experimentation
- **Political Analysis**
    - Has a progressive anti-oppression political analysis that includes the integration of race, power, class, and gender issues
    - Supports popular education as a key strategy for social change

## **Key Responsibilities of the Executive Director**

UFE's Management Team is the highest staff decision-making body of UFE, with the ED serving in a key facilitative leadership role within the organization as described in the responsibilities below. The Executive Director is accountable to both the Board and the Management Team (MT) and evaluated by both bodies, along with input from staff and external stakeholders using a 360-degree evaluation process.

### **Areas of Responsibility**

#### **Organizational Management and Operations**

- Provides oversight of Development, Operations and Communications Departments and guidance and supervision of senior staff in these departments.
- Assists in the development of Team and Department Charters.
- If requested by Management Team, the ED will take an active role in supporting Program Department management.
- Facilitates the Management Team (MT) meetings, which uses a participatory, collaborative model (MT is highest decision-making staff body)
- Responsible for helping MT focus on the strategic priorities of the organization.
- Provides leadership to and oversight of UFE's financial functions.
  - Works closely with finance staff and outside resources to assure accurate and timely reporting and monitoring of banking relationships.
  - Works with MT and Board to ensure the financial stability of the organization, including hiring auditors, investment strategies and budgeting.
- Provides leadership and oversight for all operational functions such as technology, human resources, leasing, insurance and other organization wide functions.
- Responsible for managing consulting contracts for outside services such as accounting and human resources, as needed.

## **Fund Development**

- In close collaboration with Development Director and Development Department and program staff, identifies, cultivates, and solicits gifts from current and new individual donors (includes in-person visits)
- In close collaboration with Development Department and program staff, identifies and cultivates relationships with foundation program officers.
- Coordinates the relationship between Development and Programs, so that fundraising and programs are inextricably linked and informs both areas of work.
- Helps support and coordinates the Board's participation in identifying, cultivating, and soliciting gifts from individual donors together with development staff and supports other fundraising activities of the Board
- Until a Development Director is hired, leads the Board-Staff Development Team

## **Programs, Strategic Thinking, Overall Planning, and Evaluation**

- Provides facilitative leadership in UFE's strategic thinking, planning, and evaluation processes, including new program initiatives and opportunities for UFE, in close collaboration with the Strategy Team, Board, Management Team, and Program Department.
- Leads work of UFE's Strategy Team and stays informed of program developments: provides input on direction of programs in fulfilling UFE's mission.
- Ensures regular evaluations and outcome measurement of all programs and operations

## **Work with Board** (in collaboration with the Management Team)

- Meets regularly with the Board's Executive Committee in addition to another member of the Management Team.
- Coordinates and manages Board's responsibility for developing and cultivating relationships with external stakeholders (key individuals, partnerships). Implemented in close coordination with program staff.
- Ensures and manages discussions with the Board regarding key strategic decisions that need to be addressed by the Board-Staff Strategy meetings and/or by the Board.
- Coordinates Board-Staff teams and committees.
- Assists Board in recruitment, cultivation, and orientation of new Board members.
- Helps ensure new Board members are aligned with UFE's System-Wide Governance model criteria (see governance model, e.g., willing to work within a shared governance model).
- In regular communication with Board chair in addition to the designated Management Team representative, ensuring transparency of Board process with the staff.
- Ongoing relationship-building between the Board and staff.

### **External Relationship-Building, Visibility, and Public Speaking**

- In partnership and close collaboration with staff and Board, helps develop and cultivate new and existing external relationships and partnerships with organizations, networks, alliances, coalitions, and individuals that are cross-program or organization-wide.
- Helps identify possible opportunities for UFE in regards to new opportunities for partnerships and initiatives for UFE-- to bring back to the Board and staff for consideration.
- On behalf of UFE, serves as a public speaker on issues/events that are about UFE as a whole or cross-program, (e.g., as keynote speaker at conferences, events, etc.).
- Serves as spokesperson to the media in addition to designated Board members and program staff.

### **Compensation**

The compensation package is based on skills and experience and is competitive with comparable national progressive nonprofits and has a generous benefit package.

### **Contact Information**

**All inquires, nominations, and applications** including cover letter describing your interest and qualifications for the position, writing sample, salary history and requirements, where you learned of the position, and contact information for three references (in attachments as **MS Word 2003 Documents only**) should be directed to:

Judy Freiwirth, Transition Consultant at:

[Judy@NonprofitSA.com](mailto:Judy@NonprofitSA.com)

**(Only electronic applications will be accepted)**

**Only complete applications that include a cover letter will be considered.** In order to expedite the internal sorting and reviewing process, please type your "name (Last, First), UFE ED Search" as the only contents in the subject line of your e-mail. Due to the pace of this search, candidates are encouraged to apply as soon as possible, but no later than April 24, 2009. Applications will be reviewed as they are submitted.

United for a Fair Economy is an Equal Employment Opportunity Employer and actively seeks a diverse pool of candidates. We encourage all qualified candidates to apply, especially women and people of color.

*For more information about UFE and its programs, please visit: [www.faireconomy.org](http://www.faireconomy.org)*