



POSITION SPECIFICATION

POSITION TITLE:	President & Chief Executive Officer
REPORTING TO:	Board of Directors
LOCATION:	Lakeside, Ohio
THE ORGANIZATION:	<i>The Lakeside Association (aka Lakeside Chautauqua)</i> http://www.LakesideOhio.com

To enrich the quality of life for all people, to foster traditional Christian values and nurture relationships through opportunities for renewal and growth...spiritually, intellectually, culturally and physically...while preserving Lakeside Chautauqua's heritage.

Lakeside Chautauqua Mission

Vision: A Chautauqua community dedicated to Christian values and cultural excellence, nurturing mind, body and spirit.

Values: Lakeside is a Chautauqua community dedicated to lifelong learning through servant leadership, hospitality, collaboration, accountability, and quality programming in pursuit of a world-class guest experience.

Chautauqua Pillars: Education. Cultural Arts. Religion. Recreation.

OVERVIEW:

Founded 147 years ago along the shores of Lake Erie, Lakeside Chautauqua is part of the Chautauqua Movement which represents a community that welcomes all people together to participate in lifelong learning opportunities through the four Chautauqua pillars: education, cultural arts, religion and recreation.

Lakeside Chautauqua is complex. It is a resort community, a historic site, a municipality, a religious and cultural arts organization, and an educational institution. Additionally, it has the social and political dynamics of a small town and historic Christian connections. It is a 501c3 charitable and educational organization committed to Judeo-Christian values.

With a very strong sense of history including a place in the national registry of historic districts, Lakeside has a strong financial budget, committed staff and community that lives where they play. Lakeside has developed a talented and highly committed board, staff and volunteer group eager to grow and advance its mission and master plan.



Lakeside CHQ is seeking a CEO who, building on the organization's past successes, will strengthen its future and ensure Lakeside as a vibrant organization for the next 150 years. Based in Lakeside, Ohio, the CEO reports to a 25-member board of directors, works in collaboration with a 15-member foundation board of directors, provides leadership for and manages 42 full time, 200 seasonal staff and 200 volunteers serving over 100,000+ individuals yearly on the shores of Lake Erie.

The CEO will oversee the 10M operating budget and a growing foundation currently at 7M. The Annual Fund raises 1M annually for the budget. 11.6M has been raised over the last three years in total annual contributions.

Click here to view Lakeside CHQ: <https://www.youtube.com/watch?v=pKeubpCLm6g>
Supporting material is included at the end of this document.

DELIVERING THE MISSION

The Lakeside Master Community Plan is a living document meant to be flexible and inform the investment of community resources over the next 15-20 years. Lakeside CHQ is several years into implementing the Master Plan (launched winter 2016/2017), but it has been several years since any refresh of the Strategic Plan. The new CEO will need to devote significant time, at the outset, to update the current Strategic Plan and ensure that it is in alignment with the facility-based Master Plan.

The Lakeside Master Plan

1. Reflect the Four Pillars of Chautauqua
2. Protect and Preserve the Character of Lakeside
3. Support Lake Erie as the Cornerstone of Lakeside
4. Consider the Future Needs of all Lakesiders
5. Help Lakeside Prioritize
6. Be Visionary
7. Be a Starting Point

Strategic Goals

1. Deliver World Class Hospitality
2. Improve Organizational Effectiveness
3. Enhance Programming Experience
4. Grow Generosity and Revenue
5. Invest in Infrastructure
6. Sustainability throughout all Lakeside Operations



LAKESIDE TODAY

- Cultural and spiritual hub along the south shore of Lake Erie
- Provides families, a vacation destination to rest, renew and reconnect and enjoy world-class recreation venues on the shore of Lake Erie
- Place to experience famed entertainers, musicians, and lecturers every day of the summer.
- Safe adventures for children and grandchildren to freely explore, learn and make lifelong friends.
- Front porch gatherings and late-night walks for ice cream
- Welcomes all people to gather and participate in lifelong learning opportunities
- Stands on four pillars of religion, education, cultural arts and recreation
- Committed to fostering traditional Christian values
- Leader in the Chautauqua Movement

Lakeside Chautauqua Programs and Services (below is a sampling of the many):

- Lecture Series
- World Affairs Dialogue
- Gardening Programs
- Author Events
- Live Entertainment
- Lakeside Symphony Orchestra and Pre-Concert Talk
- C. Kirk Rhein, Jr. Center for the Living Arts
- Lakeside Heritage Society and Museum
- Environmental Stewardship Society
- Lakeside Women's Club
- Historic Tours
- Literary & Scientific Circle
- Special Workshops & Seminars
- Kids, Teens & Family Recreation: Sailing, Tennis, Mini-Golf, Volleyball, Pickleball, Shuffleboard, Basketball
- Fitness Center; Aquatics Center and Pool
- Worship Celebrations
- Wednesday Family Picnics in the Park



Interesting Facts about Lakeside CHQ

Children/Teens Served Yearly	14,000+	Homeowners	2000
Tennis Courts	7 (2 clay)	Swimming Pool	New!
Pickleball Courts	8	Baby Pool	1
Shuffleboard Courts	26	Lakefront Activities	Every day
Classed/Seminars	200+	Memorial Garden and Park	Very special
Classes/Seminars attendance	15,031	Recreation Events	40+
Season Gate Passes	1169	Splash Park	1
Day Passes	96,334	Walking Paths	Enough to get your steps in!
Private Cottages	1000	Entrance Gates	4
RV Homes	23 Transient 57 Permanent	Recreational Events	A calendar full
Year-Round Residents	200	Family Reunions	Year after year
Seasonal Residents	1800	Golf Carts	Rentable
Concerts and Performances	200+	Bicycles	At least 4 per house
Art Center Classes	2000+	Bike Parades	2
Art Students (children, adults)	11,580	Fireworks	July 4 th + more
Businesses	18	Gardens	Everywhere!
Restaurants	8	Birdhouses	Many per home
Movie Theatre	1	Hammocks	Several per block
Hotels	2	Dogs	Big and small
B&Bs; Guest Houses	8	Facebook Groups	Several
Square Mileage	1	Newspaper Issues	12...one per week in season; 2 pre-season
Parking Lots	3	Beautification Awards	Yes
Homes Built in last 5 Years	15	Cottages with Cute Names	Most!
Weeks of 'the season'	11	Miniature Golf	18 holes
Beach	1	Volunteers	150-200



A DAY IN THE LIFE OF LAKESIDE CEO

The CEO may, in one day, may meet with a major donor to help guide them toward a giving opportunity (*relationship challenge*), meet with a regional organization to discuss the possibility of building a partnership (*strategic and operational challenge*), review program effectiveness data with staff and board in light of a budget issue (*operational effectiveness challenge*), review an agreement to build a new rental housing structure with a potential developer (*operational leadership challenge*) and address the departure of a talented member of the staff (*staff leadership challenge*).

Interim CEO and current CFO/COO Dan Dudley stepped in when Kevin Sibbring retired after 15 years of revitalizing Lakeside. The new CEO will have the benefit of working with an engaged board and a staff that has rallied together as an exceptional cohesive team.

POSITION SUMMARY

Reporting to and working closely with the Lakeside Chautauqua Board of Directors as well as the Lakeside Chautauqua Foundation Board of Directors, the President & Chief Executive Officer will be responsible for:

- Overall Success and Creative Growth
- Vibrancy of Programs
- Quality and Character of the Community
- Fundraising Strategy
- Financial Sustainability
- Impact of All

The CEO will oversee Lakeside's primary leadership roles to become world-class. These include:

- Programming
- Strategic Partnerships
- Fundraising & Donor Relations
- Marketing
- Financial Management
- Operations
- Human Resources
- Municipal Services

Direct reports include: Chief Financial Officer/Chief Operating Officer; Senior Vice President Programming and Interim Advancement and Communications; Senior Vice President Municipal Services.



SCOPE AND RESPONSIBILITIES

Working within the Lakeside CHQ culture, the new CEO will support and advance the vision, mission, priorities, and guiding values of Lakeside. Specific responsibilities include:

- **Strategic Leadership and Programmatic Vibrancy**

- Set vision dedicated to a comprehensive program offering growth and renewal opportunities spiritually, culturally, intellectually and physically.
- Responsible for performing and vision arts, education, wellness, religious life and recreation programming.
- Oversee master planning, short- term operational and long-range strategic planning while holding appropriate parties responsible for implementation. This is a priority.
- Lead with integrity and authenticity.
- Lead significant change management process.
- Guide the formation of major capital projects & expenditures with key constituents and ensure on time and on budget.

- **Board Management and Development**

- Collaborate with the board to ensure strong fiscal health and governance, providing support to best utilize the talents and resources of board members, stimulate involvement, and recruit new members.
- Advise board and committees on matters to promote the efficient operation of Lakeside.
- Maintain overall fiscal responsibility for the annual operating budget and financial objectives and oversee the most effective use of financial resources, working closely with the board and staff.

- **Effective Communicator and Relationship Builder**

- Ability to generate passion and understanding in others through frank discussions.
- Serve a chief spokesperson.
- Initiate ongoing effective communication with the board chair, board of directors, staff, donors, residents, guests, volunteers, strategic partners and other stakeholders.
- Initiate, develop, and ensure strong, collaborative and effective relations with homeowners, community organizations, including township and county government officials, regional and state arts leaders, local and regional business leader's, strategic partners and outside organizations.
- Set high standards in the delivery of outstanding guest experience and hospitality.
- Establish broad public image for Lakeside, clearly articulating the needs of the long-term impacts on the community.
- Align community with the rules of the Design Review Board.



- **Personal Success Attributes**

- Value goals, objectives and achievements.
- Build a culture of collaboration and compliance.
- Implement change and proactively manage possible resistance to change.
- Lead by example and be willing to take responsibility for failures and successes.
- Conduct oversight while placing trust in the staff to make decisions.
- Implement, grow, develop a culture of servant leadership at all levels.
- Ensure that all activities at Lakeside are consistent with Lakeside's mission and values.
- Promote a comfortable and welcoming environment where every stakeholder is treated with dignity and respect in a friendly and personal manner.
- Ensure a spirit of collaboration is pervasive throughout the community.

- **Demonstrated Passion for Fund Raising**

- Meet total revenue generation as measured by actual versus budgeted versus last year results on a monthly, quarterly and annual basis.
- Drive strategies to increase annual fund, special events, planned giving, capital campaign, and endowment.
- Energize corporate sponsorship, foundation and government grants, and special campaigns.
- Plan marketing and communication strategies and initiatives that maximize ticket sales, lease and rental revenues, cottage rentals, Lakeside accommodations, banquet service, and other earned income.
- Identify new revenue streams and fundraising strategies that recognize current day realities.
- Actively participate in cultivation and solicitation.
- Drive a collaborative relationship between development staff and donors.
- Ensure full transparency of the finances with all stakeholders.

- **Understanding & Valuing Diversity**

- Must be sensitive to the differences in gender, age and culture particularly as they become more crucial to ensuring effective staff and volunteers, and for avoiding friction internally and externally.
- Strive for inclusion of diverse viewpoints when managing.
- Comfortable valuing and promoting diversity and have nuanced social skills to manage.

- **Understanding and Valuing Technology**

- Have a high-level understanding of social media and networking tools, databases, on-line interaction with constituents.
- Participant in setting technology priorities.



- Be open to learning new trends and understand the potential of the technology and support it.

QUALIFICATIONS AND PERSONAL ATTRIBUTES

The CEO will be a strategic, entrepreneurial, diplomatic and resilient leader who can articulate a vision and set the tone for Lakeside as a vibrant spiritual and cultural center. With a steady hand, the CEO will demonstrate an appreciation for practical accomplishments and the ability to balance strategy with the day-to-day, as well as external and internal facing requirements.

- Minimum of 5-10 years of management experience with achievement in a mission-driven organization. For-profit professionals with non-profit volunteer strategic management will be considered.
- High degree of energy, integrity, courage as well as the intellectual, organizational, and personal qualities to quickly earn respect and cooperation from all constituencies.
- Well balanced in body, mind and spirit with a deep curiosity towards life in general.
- Vigorous work ethic and entrepreneurial spirit.
- Demonstrated success in fundraising, specifically major donors.
- Ability to manage multiple constituents. Experience and ability to partner and team play with a strong and active board and other key leaders is critical.
- Knowledge of business and management principles involved in leading strategic planning, leadership technique, resource allocation, human behavior and performance, and change management.
- Effective track record of staff management with the proven ability to cultivate and build a team.
- Outstanding listener who can gather information and craft strategies for winning the minds and souls for the common good.
- Effectively multi-task and establish priorities. Highly efficient in time management and can meet deadlines under pressure. Ability to work and make judgements independently and take initiative. Well-disciplined and extremely resourceful self-starter. Decisive.
- High level of comfort with public relations and public speaking as well as communicating information to a wide range of audiences, from donors to homeowners and volunteers to business owners to the press and the general public. An interest in the arts, performance, families, community, Christian values, and the environment is key.



- Led large or mid-size organization – for profit and non-profit.
- Business acumen grasp of financial principles, marketing savvy and broad experience in qualitative and quantitative decision making.
- Sincere customer service approach both internally and externally.
- Demonstration of high emotional IQ, self awareness and empathy.

EDUCATION:

Bachelor's degree is required

CONTACT INFORMATION:

Lakeside Chautauqua has exclusively retained the services of Montague & Associates to lead the initiative for the President and Chief Executive Officer. The team is being led by Founder and CEO, Mary Lee Montague.

Lakeside Chautauqua is an equal opportunity employer. Those interested in applying for the position should direct a complete chronological resume to Montague & Associates team member:

Nancy DeMoss

Vice President, Candidate Management

Montague & Associates

704-517-8146

nancy@mlmontague.com



SUPPORTING MATERIAL

Overview:

In our fast-paced world full of modern conveniences, many families often travel with an eye or an ear connected to life at home, with work or other responsibilities.

More and more families are searching for a unique summer vacation to rest, renew and reconnect with loved ones. Many are looking to build a tradition.

At Lakeside CHQ parents and grandparents alike relax knowing that the children are safe and happy, and have plenty to do, see and hear each day. Lakesider's come from as far away as Australia and as nearby as Sandusky and Port Clinton to participate in the summer Chautauqua programs. They stay for a day, weekend, week or the entire summer. There is also a handful (200) that live on the grounds year-round.

Lakeside CHQ is a unique experience for everyone. The Chautauqua community allows one to reconnect with family, grow spiritually, expand intellectually, unleash creativity and/or challenge yourself physically. The opportunities are endless. Lakeside CHQ remains an annual tradition for generations of families.

History:

On a warm August day in 1873, a group of Methodist preachers unloaded axes and shovels to begin clearing a tract of land near Lakeside CHQ's present-day Central Park. They built a podium, plank benches and several platforms of stone upon which fires would light the meetings to come. On the edge of the clearing, tents provided shelter for preachers and their families. People from the surrounding countryside arrived on foot and in wagons, for Lakeside CHQ's first public event. It was an old-fashioned camp revival meeting with rousing hymns and preaching's with bonfires that matched!

For the rest of the summer of 1873 and the next, revivals continued, and the crowds grew. Methodists predominated, but other denominations were present and welcomed. A large shelter with a permanent roof and open sides was built near the site of today's Hoover Auditorium. Members of the German-speaking Methodist Church joined in 1874 and would eventually build their own auditorium for programs. That building still stands today as South Auditorium.

A few cottages were built overlooking Lake Erie, while the tents multiplied. Sanitation was basic and beds were not much more than piles of straw covered with quilts and blankets. Cooking was usually done outdoors. Permanent wooden tent frames soon became cottages. Increasing crowds demanded more comfort and in May of 1875 the first unit of the current Hotel Lakeside Chautauqua was built.



The Chautauqua Movement:

Meanwhile in 1874, an Akron, Ohio manufacturer, Lewis Miller, and John Heyl Vincent, a Methodist minister, founded the Chautauqua Institution at Lake Chautauqua, New York. While its initial mission was to train Sunday school teachers, the Chautauqua venture soon expanded into a summertime center for adult education and cultural enrichment.

That powerful notion--a faith-based summer resort offering both religious and secular education--was to blossom into the Chautauqua Movement. By the early 1900s, more than 300 Chautauqua-style resorts associated with various Christian and Jewish congregations had been established from New Jersey to California.

The word Chautauqua became, and is today, the generic descriptive term for resorts that blend the summer season with religion, education, cultural arts and recreation. Most Chautauqua communities shared similar financial arrangements combining donations with admission fees. The fee entitled the guest to most if not all the organization's programming.

The growing Chautauqua Movement was a natural fit for Lakeside CHQ. Its first Sunday school training sessions were held in 1877, which blossomed into a robust Chautauqua program full of religion, education, cultural arts and recreation opportunities during the 1890s. Those same four founding elements, or "Chautauqua pillars", remain in place at Lakeside CHQ today.

The Chautauqua Pillars:

Lakeside CHQ's spiritual roots have remained strong throughout its long history. The early revivals and bible studies evolved into our modern program of Sunday worship, study groups and evening praise and prayer along the Lake Erie shore. Clergy and musicians of all faiths continue to inspire and guide Lakeside CHQ audiences with both traditional and contemporary services.

Lakeside CHQ continues its educational tradition with lectures ranging from health and wellness, history, music appreciation and much more. At a time when music and arts education is being eclipsed in American schools, our Fun with Music program for children and the C. Kirk Rhein, Jr., Center for the Living Arts offer a wonderful summertime alternative for all ages.

Educators from around the world have spoken at Lakeside CHQ, including Jane Adams, Susan B. Anthony, Gov. William McKinley, Speaker of the House Champ Clark, Amelia Earhart, Eleanor Roosevelt, J.C. Penney, Lowell Thomas, Drew Pearson, Tony Danza and Paul Reiser.

Sometimes the famous just dropped by for a visit. In the 1870s, President Ulysses S. Grant joined fellow Civil War veterans in an annual reunion. President Rutherford B. Hayes was a



guest at the Hotel Lakeside CHQ in 1891. With lights blazing in 1933, the Graf Zeppelin, predecessor of the ill-fated German dirigible Hindenburg, cruised over Lakeside CHQ on its way to the 1933 Chicago World's Fair.

Cultural offerings have expanded exponentially throughout the years to include all varieties of arts and entertainment. Performers Victor Borge, Ray Charles, America, Capitol Steps, Peter Noone, Kathy Mattea, Melissa Manchester, Wynona, Blood, Sweat & Tears and Amy Grant have all graced Lakeside CHQ's various stages.

Click here for a 40-minute video produced by 'New Day Cleveland' in 2018

<https://www.lakesideohio.com/news/archive/2018/lakeside-featured-on-cleveland-fox-8-new-day>

Click here and actually 'walk the streets' of Lakeside and see the 'living park' in action. Video is approximately 60 minutes.