



**Central Boston Elder Services
CHIEF EXECUTIVE OFFICER
Boston, MA**

Central Boston Elder Services, Inc. (CBES), a leading non-profit provider of services for elders in the Boston area, seeks an innovative and inspirational leader to serve as its next Chief Executive Officer (CEO). One of the state's largest elder care organizations, CBES provides high quality, responsive, and supportive services and programs to the elderly and the disabled in need of health and human services. While serving the community with vision, compassion and integrity, CBES seeks to provide services in a manner that reinforces the dignity and worth of each individual; acknowledges and respects cultural sensitivity, gender, and other differences; and allows low income, frail elders to remain at home and delay or avoid institutionalization. The new CEO will build on the legacy of CBES's current Executive Director, Catherine Hardaway, who is retiring from her role following 20 years of visionary leadership.

Since its founding in 1974, CBES has been a center of community involvement and an essential part of the Boston elder care network. CBES serves more than 8,000 individuals annually, providing them with care, promoting their independence, and respecting their dignity. The agency has approximately 175 full-time employees, including nurses, care managers, and other administrative staff, with an operating budget of approximately \$60 million. CBES operates in the Boston neighborhoods of Allston, Back Bay, Fenway, Mission Hill, North Dorchester, North Jamaica Plain, South End, and Roxbury.

In collaboration with the Board of Directors, the CEO will provide strategic vision and organizational leadership for CBES. S/he will be expected to expand the agency's reach and increase its impact by developing new and innovative approaches to serving Boston's elder community. The CEO will possess a strong entrepreneurial spirit and an ability to identify developing community needs, create responsive and innovative programming, and secure appropriate funding. S/he will possess strong communication and interpersonal skills that enable her/him to build and nurture strong relationships with staff, as well as advance the organization's public profile by building significant relationships with state and city officials, other elder care providers, civic groups and advocacy associations.

This is an extraordinary opportunity for an innovative and compassionate leader to join a mission-driven organization that is poised to take on new challenges. CBES is looking for candidates with passion for its mission and core values, coupled with acute business and organizational leadership skills. The ideal candidate will have experience addressing the challenges of growing a complex enterprise and effectively aligning its strategies and operations. The successful CEO will be a tireless advocate with a deep belief in the value of empowering and serving the at-risk elder population in Boston.

Isaacson, Miller, a national executive search firm, has been engaged to assist with this important search. Inquiries, nominations, and applications should be directed in confidence to the firm as indicated at the end of this document.

BACKGROUND

Central Boston Elder Services is one of 26 Aging Service Access Points (ASAPs) in the state of Massachusetts, and one of three in Boston. ASAPs are private, non-profit agencies that provide information, referrals, case management, and protective services for elder populations, as designated by the Massachusetts Executive Offices of Elder Affairs (EOEA). Each ASAP oversees a distinct geographic area, with CBES covering Allston, Brighton, Back Bay, Fenway, Mission Hill, North Dorchester, North Jamaica Plain, South End, and Roxbury.

In 1974, following the tireless efforts of community leaders and elder activists from nine Boston neighborhoods, Area II Home Care for Senior Citizens was incorporated as a private, non-profit organization. Ten years later, in 1984, the agency was renamed Central Boston Elder Services, Inc. Founded by local community leaders and elder care advocates, CBES was established to meet the needs of an underserved minority population in Boston's urban communities. CBES stands firm in its commitment as the only Minority Business Enterprise (MBE) within the 26 elder care agencies in Massachusetts.

CBES serves its clients through its intake, assessment and referral services. Each CBES client participates in an assessment process in order to determine the right program match for each person's unique requirements and eligibility and is assigned a case manager to develop an individual care plan. For direct care, each client is assigned to organizations that are subcontractors of CBES. In addition, case managers oversee and keep clients up-to-date with elder advocacy programs and are knowledgeable about benefits, funding sources and guidelines for services and programs beyond the scope of CBES. As the needs of clients change, case managers make the necessary adjustments to ensure proper care is as responsive as possible.

Working alongside a number of committed contractor partners, CBES provides direct services to the elder population. These partners submit to a thorough RFP process, which is overseen by all three Boston area ASAPs. Eligibility for services is based on a sliding scale and is determined by age, income and needs. Most Boston residents qualify to receive services at little or no charge.

In addition to operating its own independent programs, CBES also partners closely with the two other ASAPs in Boston, Boston Senior Home Care and Ethos. The three Boston ASAPs have collaborated to create a separate 501(c)(3) organization called the Elder Care Alliance, which allows the three organizations to provide combined services and a single point of entry for certain government-funded programs. CBES also participates in the broader network of ASAPs across the state, contributing to planning and strategy development activities related to the field of elder care in Massachusetts.

CURRENT PROGRAMS

CBES is a large, complex organization that runs a number of programs and initiatives under the CBES umbrella, maintaining a strong presence throughout the local community.

Home Care Services

The home care programs at CBES provide elders, the disabled, and caregivers with the help and support necessary to continue living well at home. Trained nurses and care managers create care plans based on

the different services individuals would like to receive. Eligibility for various programs is based on income and individual need, with some programs requiring MassHealth coverage. CBES case workers conduct assessments, develop care plans, coordinate service implementation, and regularly monitor their clients. Services available to elders through the home care programs include but are not limited to adaptive housing options, chore service, companion service, dementia daycare, group adult foster care, home-delivered meals, in-home health services, personal care assistants, and transportation assistance.

Under the broader category of home care services, CBES also provides more targeted program options. These include the following: the Enhanced Community Options Program (ECOP), which is designed to provide a higher level of service to seniors who are ineligible for MassHealth Standard and meet the clinical requirements for nursing facility services; the Choices Program, which provides a higher level of service in the community to elders who are eligible for MassHealth Standard and meet the clinical requirements for nursing facility services; and Consumer Directed Care, a service delivery model that empowers elders to exert greater control of their care by having the option to hire, train, manage and dismiss their own workers.

CBES also oversees programs that provide resources for adults who are disabled, including the Group Adult Foster Care program and the One Care programs, which allow disabled adults to live at home.

Protective Services

In November 2015, oversight of the Boston Elder Protective Services Program transferred from another ASAP to CBES, making CBES the only protective service provider for elders in Suffolk County. The Boston Elder Protective Services Program assists persons 60 years and older who are at-risk or are suffering from self-neglect, neglect by a caregiver, physical, emotional, sexual abuse, or financial exploitation. CBES intervenes in situations where abuse and/or neglect endangers an elder's health and well-being in any way. CBES case workers investigate reports of neglect or abuse and create a service plan to address the situation. Among the services that the protective service program might recommend are home delivered meals, home care services, alternative housing options, crisis intervention, safety planning, physician referrals, guardianship, and advocacy.

Additional Services

One significant development in the field of elder care has been the creation of Accountable Care Organizations (ACOs), which are groups of doctors, hospitals, and other health care providers who come together voluntarily to provide coordinated high quality care to the Medicare patients they serve. Coordinated care helps ensure that patients, especially the chronically ill, receive the right care at the right time. CBES is moving into the ACO field through a new partnership with Boston Medical Center.

In addition to the services it provides, CBES built, owns and oversees a residential building for elders in Dudley Square. There may also be potential for building additional housing or other facilities on CBES-owned property.

FINANCES

CBES's \$60 million in revenue is primarily generated through reimbursements, most of which come from MassHealth. Several other insurers also provide funding. While periodic deficits occur due to the

Commonwealth's complex reimbursement formula, CBES maintains a cash reserve of \$4 million and an investment portfolio of \$1.7 million to undergird its financial sustainability.

GOVERNANCE

With the CEO, a 15-19 member Board of Directors governs CBES. The CEO and Board operate through an Executive & Finance Committee that oversees the operations of the organization. The Board and CEO also share a reciprocal responsibility to keep one another informed of the present condition of the organization, ensuring its health and vibrancy.

THE POSITION

This is an exciting opportunity for a committed and compassionate leader to join CBES. Reporting to the Board of Directors, the CEO is the chief administrative officer of CBES and will work closely with the Board and the executive leadership team to provide strategic leadership for the organization. CBES seeks a CEO who will understand its mission, legacy and vision and who has the experience, strength of character and managerial capacity to marshal its considerable assets and work towards new and ambitious goals. The position calls for a person with proven leadership experience who can effectively manage relationships and strengthen CBES's collaborative partnerships.

The CEO has nine direct reports, including the Director of Projects and Quality, the Director of Culture and Community Development, the Director of Human Resources, the Director of Programs and Professional Development, the Chief Financial Officer, the Director of Clinical Services, the Director of Long Term Support Services, the Director of Protective Services, as well as an Executive Assistant.

Alongside the executive leadership team, the CEO will lead the development of programs and the delivery of services designed to achieve the mission and vision of CBES. Working closely with the Board, staff, external partners and constituents, s/he will continue to grow and improve CBES's care model for elders, establishing long-range goals, strategies, plans, and policies.

The CEO must also serve as an effective external spokesperson, advocating for CBES while fostering collaborative and productive working relationships.

The CEO is responsible for the management of the financial health and well-being of CBES. In addition, the CEO oversees the \$60 million budget and day-to-day operations of the organization, and articulates and executes strategies and programs that are consistent with Board policy, EOEA mandates, and the vision of the organization. The CEO should possess keen business and financial acumen to strategically solidify the agency's financial future in a changing market with diminishing government resources.

CHALLENGES AND OPPORTUNITIES

CBES has experienced tremendous success and growth over the past decade. With its broadening reach and extensive partnerships, the next CEO will have an opportunity to lead the organization into its next exciting chapter. The CEO will engage, convene, educate, and coordinate with a wide array of constituents and stakeholders to support and create programs, advocate for public policies, and secure financial resources to enhance services for its elderly and disabled clients. Bringing a successful track

record of effective leadership and management, the CEO will be expected to work in conjunction with the Board of Directors to address the following challenges and opportunities:

Delivery of High Quality, Client-Focused Care

The CEO will oversee all of CBES's programs, ensuring that the programs and services fulfill all official requirements in a manner that is consistent with the goals and strategic plan of CBES. S/he will collaborate with clinical and administrative leaders both within and outside of the CBES community to ensure the organization continues to deliver excellent, equitable care to its clients.

As the client population shifts with the incoming baby boomer population, the needs and requirements of the elder population in Boston will likely change. CBES must be prepared to address these needs in new and creative ways. To keep pace with the trends in elder care and continue to preserve and grow CBES as a critical provider within the Boston elder care community, the CEO must explore new program opportunities.

Strategic Business Development

The CEO will work with the Board of Directors, staff, and broader community to continue to develop the long-range vision and strategy for the future of CBES. While CBES is currently in a strong financial position, there are some limitations to the organization's funding streams, and some programs are operating at a deficit. With an entrepreneurial attitude, the CEO will critically evaluate new business opportunities and be willing to take on new risks as an organization. S/he must be open to expanding into new areas and exploring opportunities for new revenue streams. One possible area of expansion may include the exploration of private pay options, particularly in light of the shifting needs, demographics, and financial position of the elder population.

Staff Leadership and Management

As a communicative and decisive staff leader, the CEO will promote a collaborative environment and a unified commitment to CBES's mission. S/he will ensure that the organization is appropriately structured and operationally strong, enabling CBES to smoothly and efficiently carry out the mission of the organization. The current executive leadership team is a highly competent and committed group that has played a significant role in the growth and success of CBES. The CEO will continue to empower staff, developing new opportunities for staff training and development.

CBES is a unique organization that provides many opportunities for staff appreciation, ranging from ice cream socials to a Valentine's Day raffle. Retention can be a challenge in this field of work, and it is important to create a work climate that attracts, retains, and motivates staff and volunteers.

Strengthen Partnerships and Strategic Alliances

Central to CBES's success have been the strong partnerships that the organization has developed with other ASAPs, community leaders, and legislators. Many of CBES's successful initiatives have come about through collaboration between and among its ASAP colleagues. The CEO must be a visible figure within the communities that CBES serves, nurturing and building new relationships with state and local executives and legislators, staff, board members, residents, and other service organizations, including

other ASAPs. Through these relationships the CEO will stay abreast of trends in elder care and identify sound programmatic partnership opportunities that may complement CBES's mission and programs. S/he will also serve as CBES's public spokesperson before the legislature and public at large, communicating the organization's story to the broader community.

Board Engagement and Development

The CEO will be expected to work closely with the Board of Directors to aid in strategic governance and recruit new members to the Board. S/he will be responsible for actively engaging and developing the Board of Directors, ensuring that the Board fulfills its responsibilities. The CEO must inform the Board regarding any organizational updates and significant organizational decisions, and keep the Board abreast of any potential problems that could affect the future health of CBES. The CEO will work with the Board President to create specific Board Committees when required, in addition to recommending individuals for Board membership.

THE IDEAL CANDIDATE

This is an exciting opportunity to lead a respected organization vital to the elder care community in Boston. The ideal candidate will provide the vision, motivation, and management skills necessary to ensure the continued success and constant improvement of the organization. While no one candidate will embody every quality, the successful candidate will bring many of the following professional qualifications and personal characteristics:

- A passion for the mission of the organization and sensitivity to the needs of the elder population;
- Demonstrated experience in strategic decision-making, leadership, and operational management in a complex organization;
- A strong entrepreneurial spirit and willingness to take calculated risks to keep the organization in the forefront of anticipating and responding to community needs;
- Demonstrated financial acumen and a history of successful management of budgets and financial resources, including experience working with public agency funding;
- A proven relationship-building record, as well as the capacity to recognize opportunities for new strategic alliances, and for engaging with a variety of constituencies such as other service providers, community groups, union leaders, and federal, state and city government officials;
- A positive management style that empowers staff and encourages a supportive, collaborative work environment;
- Excellent written and oral communication skills;
- Demonstrated commitment to valuing and promoting diversity;

- Compassionate advocate for clients, families, and staff;
- Bachelor's degree required. Master's degree in social work, public administration, human services, business administration, or an equivalent field is preferred.

TO APPLY

Inquiries, nominations, and applications, including a curriculum vitae or resume and letter of interest, may be directed in confidence to:

Monroe "Bud" Moseley, Vice President
Donna Cramer, Managing Associate
Kelly Shenk Koontz, Associate
Isaacson, Miller
617-262-6500

www.imsearch.com/6620

Central Boston Elder Services, Inc. is an Equal Opportunity Employer.