



LAKE SHORE

**ORGANIZATION, POSITION DESCRIPTION
AND PERSONAL PROFILE
FOR THE POSITION OF
PRESIDENT & CEO**

Search conducted by



Pangburn International

April 2021



THE ORGANIZATION:

LAKESHORE FOUNDATION

www.lakeshore.org

POSITION TITLE:

President and CEO

REPORTING TO:

Lakeshore Board of Directors

LOCATION:

Birmingham, Alabama, USA

About Lakeshore Foundation

Lakeshore Foundation's vision is a simple one. It is to help create a world in which every person has the opportunity to achieve a healthy, active, and independent life.

Embedded in its mission is the goal to provide opportunity for individuals with a physical disability or chronic health condition to live a healthy lifestyle through physical activity supported by research, advocacy, and health promotion. As a premier international deliverer of this mission, Lakeshore achieves this goal through several areas of focus.

1. Physical Activity, Sports and Recreation

Physical activity is at the heart of Lakeshore Foundation. Lakeshore's fitness, aquatics, recreation and athletic programs offer a variety of health and wellness opportunities to people with physical disabilities and chronic health conditions. In addition, nutrition and programs centered on well-being, including stress management are offered.



Lakeshore's Lima Foxtrot Program serves members of our Armed Forces who sustained physical injuries during their time of service. More than 2,800 injured service men and women and their families, from across the U.S., have participated using Lima Foxtrot's lessons from sport and recreation to pursue an active, healthy lifestyle.



Lakeshore has a long-standing relationship with the U. S. Olympic and Paralympic Committee. It became an official U.S. Olympic & Paralympic Training Site in 2003 and is the home of USA Wheelchair Rugby.



2. Advocacy

Lakeshore’s advocacy efforts invite people with and without disabilities to be engaged, informed, and empowered to create partnerships that promote inclusion, access, and equal representation in our local, national, and global policy initiatives. In partnership with the disability community, Lakeshore’s advocacy efforts seek to influence decision-makers, inform public opinion, shape public policies and promote social change.



Lakeshore’s Advocacy Team:

- Ensures Lakeshore’s global presence in advocating sport development and inclusion in physical activity, physical education, recreation and play for people with disability around the world through presentations and participation in committees and boards.
- Facilitates grants to support access to sport, transportation/active transportation, trails, physical activity and diabetes prevention or other revenue generating adapted programs.
- Works with people with disabilities and chronic health conditions to eliminate barriers to physical activity participation.
- Partners with The World Games 2022 to support universal design in the Birmingham region that includes transportation access, green spaces and sport venues.
- Works to equip others to advocate with and improve individual wellness and societal inclusion of people with disability.

Partnerships are a critical component to Lakeshore’s advocacy work. One of those critical partners is the National Center on Health, Physical Activity and Disability (NCHPAD), a national resource and practice center that empowers communities, organizations and individuals

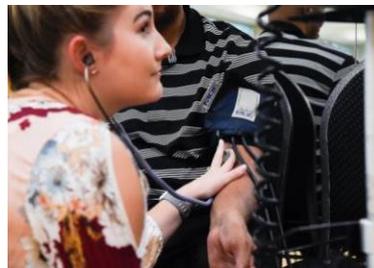
through training, technical assistance, advocacy, thought leadership, health promotion, and health communication to create livable places, healthy people, and sustainable inclusion. NCHPAD is located in Lakeshore’s facility and collaborates with Lakeshore staff. www.nchpad.org



3. Research

The UAB/Lakeshore Research Collaborative is a research partnership between Lakeshore Foundation and the University of Alabama at Birmingham (UAB). The Collaborative seeks to improve the quality of life of individuals with physical disabilities through comprehensive rehabilitation and sport science research. This research focuses on the development and evaluation of new programmatic, policy, and service efforts, the development and validation of new supportive technologies, and the identification and advancement of meaningful alternatives for people with a physical disability or chronic health condition.

Funded by an investment of \$2 million from Lakeshore Foundation, the partnership established the Lakeshore Foundation Endowed Chair in the UAB School of Health Professions. James Rimmer, Ph.D., a world renowned, leading expert in rehabilitative science for 30 years, was named the Lakeshore Foundation Endowed Chair in Health Promotion and Rehabilitation Sciences in January 2012.



Currently, there are 20 ongoing Collaborative projects that are supported by \$7 million in annual federal funding. The Collaborative’s funding sources include National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR), National Institutes of Health (NIH), U.S. Department of Defense (DOD), Centers for Disease Control and Prevention (CDC), UAB and Lakeshore Foundation.

Located on the Lakeshore campus, UAB's Rehabilitation Engineering Research Center on Recreational Technologies (RERC Rec-Tech) is a five-year grant funded by the National Institute on Disability and Rehabilitation Research of the U.S. Department of Education. The primary mission of the RERC Rec-Tech is to expand new knowledge and research on recreation technology for people with disabilities and to disseminate technology development through education, training and collaboration with private sectors.

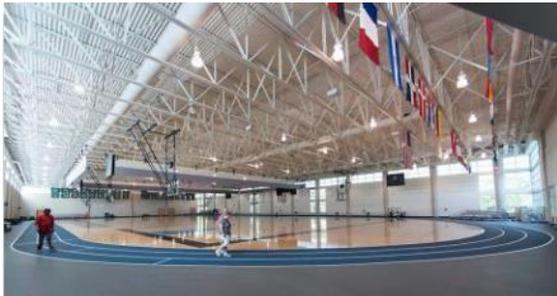


Organization at a Glance:



- **Facilities and the Campus.** Located on a 45-acre beautiful, wooded campus in Homewood, Alabama, a suburb of Birmingham, Lakeshore is the home to a state-of-the-art fitness center, aquatic center, research center and housing accommodations for visitors and athletic teams. Lakeshore's facility and campus include:
 - *An indoor aquatics center, featuring two heated pools*
 - *A 6,000 square foot fitness area with free-weights, strength training and cardio machines*
 - *Group exercise studios*
 - *A three-court gym and indoor MONDO® surface 200-meter track in the three-court fieldhouse*
 - *Six-lane archery and marksmanship range*
 - *Spacious men's and women's locker room facilities including five private assisted dressing rooms and two poolside bathrooms*
 - *Mindfulness studio*
 - *Nutrition lab (demonstration kitchen for in-person and online learning)*
 - *Multi-function meeting spaces*

- *Video production studio*
- *5 tele suites*
- *The UAB/Lakeshore Research Collaborative's Exercise and Sport Science Laboratory*
- *National Center for Health, Physical Activity and Disability offices*
- *Cottages and a Dormitory*
- *Outdoor spaces – Woodland Trail, Campus Commons, Contemplative Garden*
Also located on the Lakeshore Campus
 - *Children's of Alabama at Lakeshore*
 - *Birmingham Tennis Academy (including Lakeshore's tennis program)*
 - *Encompass Health Lakeshore Rehabilitation Hospital*



- **Staffing.** At the writing of this position description, Lakeshore employs 93 full time staff, 61 part time staff and is supported by more than 300 volunteers.
- **Finances.** The organization is on sound financial footing with assets at approximately \$119 million as of September 30, 2020. In Fiscal Year 2021, Lakeshore budgeted approximately \$13.4 million in total revenues, \$13.4 million in total expenses and \$236,000 in capital expenditures. Sources of revenue this year are projected as follows: 21% research collaborative, 33% rental income (Lakeshore rents a number of offices and buildings on its campus, anchored by a long-term leased rehabilitation hospital operated by Encompass Health), 31% allocations from the investment fund (allocation determined by the Board-approved spending policy), 6% in monthly and annual membership dues, 8% from philanthropic contributions, and 1% in program fees.

- Membership.** Lakeshore serves individuals with physical disabilities and chronic health conditions who live locally, across the U.S. and world. Membership includes access to all areas of the facility, as well as, all land-based and aquatics classes and youth, athletics and recreation programs. Currently, Lakeshore serves 3,009 members. In fiscal year 2020, the campus had 74,485 member visits, 221 guest visits and 1,362 others served. The age of the youngest member is 6 months old, and the most senior member is 101.



Position Scope and Responsibilities:

The CEO reports to the Lakeshore Board of Directors and has strategic and overall operational responsibility for Lakeshore’s financial affairs, staff, programs, and execution of its mission and business plan. She/he will ensure that Lakeshore’s fiscal, operational, marketing and communications, human resources, technology, and program strategies are effectively implemented across all segments of the organization.

Strategic & Programmatic Leadership:

- Ensure that people with a disability and the disability movement are considered in every facet of Lakeshore’s mission and programing.
- Provide strategic and operational leadership while working closely with Board of Directors in governance of the Foundation and in keeping them informed and engaged with Lakeshore.
- Ensure the development, implementation, and execution of a long-range strategic plan that achieves Lakeshore’s mission via forward movement with consistent and timely progress.
- Ensure programmatic impact and sustainability through effective program administration.
- Maintain effective relationships with a variety of external organizations including but not limited to the professional disability field, governmental agencies, corporations, national and international disability sports associations and other associations and organizations that are aligned with

Lakeshore's goals and objectives.

- Take a leadership role in identifying issues and opportunities for collaboration across the disability field and create forums to address these issues.

Revenue Generation, Fundraising and Management:

- Provide executive leadership on all revenue generation and resource development programs and activities and provide hands-on support where needed.
- Ensure the Foundation's financial stability and sustainability by maintaining healthy cash flow, successful investment oversight and optimal performance against budget.
- Promote a culture of innovation with appropriate financial risk taking commensurate with the Foundation's financial position.
- With a concierge mentality, develop relationships with members and clients to ensure that services offered are commensurate with their needs and advertised benefits.
- Play an active role in soliciting philanthropic donations from local and national corporations, foundations and high-net worth individuals by building ongoing relationships, crafting the case for financial support and presenting the appeal.
- Ensure that all funds are responsibly and prudently allocated to reflect the needs of the organization and support the achievement of the mission.

Personnel Management:

- Directly supervise, mentor, recruit, onboard, and build a highly effective Senior Management team to support and manage daily operations in accordance with the mission, objectives, established procedures and applicable laws and regulations.
- Cultivate an environment of diversity and inclusion throughout all facets of the Lakeshore community.
- Ensure department and individual job descriptions are clearly defined and developed, regular performance evaluations are held, and sound human resource practices are in place.
- Foster a culture that encourages full contribution, engagement and development of staff.
- Maintain a climate that attracts, motivates and retains a diverse staff of top-quality employees.

Board Relations:

- Develop and maintain positive and effective relations with the Board Chair, Executive Committee, and all other members of the Board of Directors.
- Ensure that the Board of Directors is kept fully informed of the opportunities, challenges and operations of the Foundation at all times.
- Serve as lead liaison between the Board and the staff.

Public Relations and Marketing:

- Provide executive leadership on all public relations messaging and marketing efforts and serve as the public face and spokesperson for the important work of the Foundation.
- Lead Lakeshore in public, private and governmental relations.
- Maintain effective relationship with the United States Olympic & Paralympic Committee (USOPC) to support Paralympic competition.
- Serves as a public "ambassador" for Lakeshore on city, state, national and international stages.

- Collaborate with existing partners such as University of Alabama at Birmingham (UAB) & National Center on Health, Physical Activity and Disability (NCHPAD) to expand disability research.
- Establish sound working relationships and cooperative arrangements with the Foundation's wide range of stakeholders and other organizations focused on disability.

Professional Experience Required:

The successful candidate should ideally possess a majority of the following core qualifications and professional experiences:

- First-hand knowledge of and/or a proven track record working with the disability community and an understanding of the disability experience.
- Senior leadership experience in nonprofit, association, government or private-sector management, which includes financial and administrative oversight responsibility.
- Experience working with, and supporting, a volunteer Board of Directors while helping them to prioritize objectives in terms of mission attainment and resource allocation.
- A proven track record in achieving strategic priorities through collaboration both inside and outside of the organization.
- A proven track record of building, managing and leading effective teams with the ability to attract, retain, grow and inspire an impactful staff of similar size and scope.
- A proven business acumen as one that recognizes finite financial resources and can prioritize allocation among many worthy programs and organizational efforts via clear operating metrics.
- A proven track record of local and national fundraising success.
- Respect for and experience in using research processes and outcomes to achieve strategic goals.

Additional Professional Experience that is Attractive in a Candidate:

- Experience in public relations and branding campaigns with a focus on educating the general public on a cause or service.
- Experience with adapted and Para sports research and theories, its products and solutions.
- Experience working within the health care industry.
- Experience working with pay-for-service membership clubs, health and/or wellness centers where members seek value and relevancy in exchange for their membership dues.
- Experience working with or within local, state or federal government offices.
- Experience helping an organization transition to a new leader.

Personal Attributes:

The successful candidate should:

- Have a deep understanding of the disability experience and is able to articulate the positive benefits of access, inclusion and physical activity.
- Understand the value of each visitor and member and be driven by a commitment to excellent customer service.
- Have the ability to effectively engage political leaders on a state and national level.

- Be an engaging and enthusiastic servant leader with strong interpersonal skills who can motivate and inspire staff to performance excellence and serve as a catalyst for collaborating with community partners.
- Possess a true commitment to innovation by motivating, encouraging and supporting staff to continually innovate.
- Have the entrepreneurial skills to nurture the culture and history of Lakeshore while creating an environment that meets the challenges of tomorrow by seeking out new partnerships, customers, and industry alliances.
- Be an effective communicator who can speak to all levels, both inside and outside the organization.
- Have the ability to build consensus within a wide spectrum of stakeholders to include the Board of Directors, members, staff, volunteers, external partners and the public.
- Possess the intellect to understand the broad issues facing health care and public health in today's environment.
- Value the contributions of all staff and have the ability to assemble a cohesive team.
- Above all, be a passionate believer in the mission and the potential of Lakeshore Foundation.

Education:

- A bachelor's degree is required.
- An advanced degree in a relevant field is preferred.

Location:

Full-time residence in the Birmingham area is required, as much of the success of this position is externally facing as the Lakeshore CEO embraces a leadership role within the community.

Birmingham is a major city with a small-town feel. The city offers its citizens a wonderful place to both live and work. Its attractions and its history can be gleaned from such sites as [InBirmingham](#) and [Birmingham Business Alliance](#).

Search Conducted by:



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To Apply:

Please electronically send a cover letter addressing your specific qualifications with respect to the position description outlined above along with a chronologically organized resume to: resumes@pangburnintl.com

An additional resource: [Sports Rehabilitation and the Human Spirit by Anita Smith](#)