



**VALTAS**  
GUIDING LEADERSHIP TRANSITION  
— FOR SOCIAL ENTERPRISES —

**Valtas Group**  
**Managing Partner**

**August 2024**

## Job Description

The Valtas Group Managing Partner (MP) is responsible for the overall strategy, success and leadership of the firm. As a small consulting practice, owned by a larger parent organization (CFO Selections) the Managing Partner works with the other Partners and Members to establish strategic direction, build Valtas' reputation and competency in our operating markets, and ensure high quality consulting services are provided to our clients. The MP reports to the MP of CFO Selections.

Valtas' business model is unique as consulting team members are independent consultants and choose to become members of the Valtas team due to our unique service offerings and opportunities. As the largest consulting firm supporting transition services for nonprofit clients in Western Washington, Valtas has supported nearly 200 organizations through leadership transitions and guided strategy and direction in the first six years of operation.

The Managing Partner opportunity is unique, and the next leader will have the opportunity to design and deeply impact the future direction of the firm. Specifically, we believe the key areas of focus for our next leader include:

### **Lead Strategic Planning and Vision:**

The Managing Partner leads this effort in the firm and communicates the organization's vision and impact within and outside the firm.

- In collaboration with the Board and partners, establish a strategic plan and direction for Valtas' growth and impact over the next 3 years. This vision should prioritize growth organically, geographically, and of the brand itself, while balancing the unique elements of operating in a NFP environment. Align this plan with CFOS' strategy where applicable.
- Monitor trends and expected trajectory of change in the nonprofit and social sectors including leadership transitions, organizational structure and strategy and business models for our clients. and retirement plans for our clients.
- Establish and expand partnerships with service providers in our market(s) offering similar and/or complementary services. Identify opportunities for synergy and alignment of Valtas' work alongside others supporting the sector.
- Build annual business plan, budget and forecast for growth and impact in each of Valtas' markets.
- Share our impact with Board and consulting team members frequently to strive for results.
- Oversee the development of internal project proposals, work plans, primary and secondary research, and qualitative and quantitative analysis.
- Be a catalyst for growth and expansion identifying opportunities for Valtas' consulting team members to add value to current and future client projects. Evaluate and encourage the development of new service offerings.

### **Grow Member Value**

The Managing Partner works for the owners of Valtas and is an owner as well. As such, they are responsible for safeguarding and growing the invested interest of those owners.

- Execute the strategic plan for the organization, balancing multiple elements, all of which are expected to lead to growth and free cash flow to Member owners.
- Balance the interests of constituents – Members, Consultants, and Clients (recognizing that social sector return is often not aligned with a revenue and growth orientation.)
- Oversee and manage succession planning and the expected transition of Members, planning for the ability to monetize their interest while ensuring continuity and sustainability for the organization.

### **Oversee our Consulting Team:**

The Managing Partner must lead by example exhibiting integrity, energy, enthusiasm, dedication, and commitment.

- Participate in the identification, screening and decision to engage new consultants, in collaboration with Valtas' partners, who align with our organizational culture and values, and meet the needs of our clients.
- In collaboration with Practice Manager(s), develop and lead consulting team resources, and/or ensure that resources are in place to do the following – identify, build and support the capability of our consulting team and flexible resources to deliver services for clients.
- Provide mentoring to partners and other future leaders.
- In collaboration with Practice Manager(s), deal promptly and effectively with conflict and performance issues with consulting team members and our client partners.

### **Support our Clients:**

Our Managing Partner is responsible for overseeing the delivery of an effective business process, covering proposals, job progression, job completion, and ensuring accurate and timely client billing and payment.

- Ensure a business process is active that builds and maintains strong, collaborative client relationships with respect to objectives, critical issues, work plan, implications, recommendations, potential risks/roadblocks, and implementation plans.
- In collaboration with the Practice Manager(s), facilitate client decision making from proposal, through placement and during the length of the engagement. Generally, this involves working with members of the clients' board of directors, who are volunteers and may have limited experience in hiring these types of consulting services.
- Follow up with client contracts on a regular basis to ensure quality control in all firm services. Ensure that feedback is delivered to address issues as they arise and support continuous improvement.

### **Manage Day to Day Business**

Our Managing Partner leads day-to-day operations for Valtas' business operations.

- Lead the delivery of high-quality consultancy solutions that are well informed, aligned to customer needs and support the leadership transition, search and project service offerings. Ensure delivery of this role in a way that promotes the values of the business and good business ethics.
- Work in collaboration with our Marketing team to promote Valtas' brand in the market(s) where we operate, including updates to print, online and other media materials.
- Ensure the firm deals effectively with risk management, including frequent and effective communication to all consultants regarding guidelines for decision making authority as part of all assignments. Serve as an advisor to team members on client specific risk mitigation.
- Lead the monthly financial package review, including preparing or overseeing the preparation of financial statements, board packages and resolutions and other applicable materials.
- Oversee collection of consulting hours against scope of work, billing and collection of fees and payment of consultants.

### **Share the Valtas Story**

Our Managing Partner is the primary spokesperson for the firm, helping build our brand and sharing our work with potential clients and the community.

- Develop a strong profile and reputation for delivering high quality consultancy solutions, both for individual clients, our various service lines of business and for Valtas as a whole.

In collaboration with our marketing team, craft storylines that clearly articulate Valtas' unique service offerings, outcomes, insights, and recommendations. Expected to include speaking engagements, writing articles, providing comments on current issues, etc. Take an ambassadorial role in promoting Valtas' in communities where our clients receive information and services.

### **Background and Experience**

The Valtas Managing Partner is a unique position and our next leader's experience may come from a variety of different types of backgrounds. As we shape the future for Valtas the next leader should bring:

- An entrepreneurial approach to building and growing our consulting business, balanced with an executive's attention to the processes and structures that are required to scale a business.
- A connection and commitment to serving a client base of nonprofit and social sector clients.
- Experience working within the nonprofit community as a consultant, staff executive leader or board member.
- An interest in leading growth for our business within our current markets and services and beyond.

### **Specific Skills:**

- Ability to develop client base from prospect identification to closed business in multiple markets and with a range of service offerings.
- Demonstrated experience building business strategy while also managing day-to-day issues and opportunities as they arise.

### **Attributes:**

#### **PROFESSIONAL**

- Is a servant leader. Ability to effectively adapt leadership to a variety of circumstances as a strategic leader and a tactical manager.
- Must have experience as a CEO or ED.
- Must have experience in a for-profit environment that generated shareholder value.
- Must have experience in a NFP entity, either as a Board member or employee.
- Has experience scaling and growing an organization, ideally across multiple markets.
- Has experience and an affinity for leading business development, sales, and marketing functions within a growing organization.
- Diversity, equity, inclusion, and access for all.
- Transparency, integrity, and setting and maintaining the highest ethical standards.
- Lead with courage, compassion, understanding, resiliency, empathy and patience.
- Ideally has led an organization of experienced market-facing executives, professional leaders.

#### **CRITICAL SKILLS**

- Master multi-tasker
- Possesses financial literacy
- Effectively manage organizational growth and change

- Inspire confidence in team members, owners and other stakeholders
- Communicate effectively and with confidence one-on-one, in small groups, in writing, and in front of larger audiences
- Model the values of the organization
- Develop, set, and share a vision and high-level strategic objectives for the organization
- Identify and evaluate new, innovative and creative approaches to fulfilling the organization's mission

#### PERSONAL

- Likes to and wants to lead
- Able and willing to travel (typically 2 weeks a month) and spend time on the ground in new markets making a significant investment in relationship building.
- Comfortable speaking to audiences large and small, able to relate and share the Valtas story.
- Cares about why a 'Valtas' needs to exist and thrive
- A social sector champion
- Empathetic but firm
- Flexible, creative, hands-on solutions oriented
- Deals with conflict in a timely, effective, and empathetic manner that preserves and strengthens the relationship