

**ROCKY MOUNTAIN PERFORMANCE EXCELLENCE**  
**POSITION DESCRIPTION FOR THE EXECUTIVE/MANAGING DIRECTOR**

**ABOUT THE ORGANIZATION:** Rocky Mountain Performance Excellence (RMPEX) is a Colorado nonprofit corporation recognized by the IRS as a 501c3 organization. RMPEX was incorporated in 2002 as Colorado Performance Excellence and since 2012 has operated as Rocky Mountain Performance Excellence. The organization provides education, training, networking, and sharing of best practices in support of performance excellence. RMPEX acts as the Baldrige Performance Excellence Award (U.S. Presidential Quality Award) organization for Colorado, Wyoming, Montana, and Nebraska.

**GENERAL:** The Executive or Managing Director (ED/MD) of RMPEX serves as the organization's Chief Executive/Managing Officer and Chief Operating Officer. In those roles, the ED/MD leads the organization's workforce and plans, organizes, directs, coordinates and controls RMPEX staffing, equipment, supplies and effectively communicates with internal and external stakeholders while exercising good judgment making decisions that benefit the corporation.

**REPORTING RELATIONSHIP:** The Executive/Managing Director reports to the Board of Directors. Routine direction is provided by the Board Chairperson or another person designated by the Board.

**DUTIES:**

**1. BOARD SUPPORT**

- a. Ensures that the Board has the resources necessary to be effective.
- b. With the Board Chairperson, the ED/MD is responsible for determining the meeting agenda.
- c. Ensures that an agenda is published a meeting agenda at least a week in advance of a routine meeting and publishes minutes within a week after a routine meeting.
- d. Responsible for ensuring all meeting logistics are in place for Board meetings.
- f. Provides feedback to the Board Chairperson on the effectiveness of the Board and recommends changes that might be needed.
- g. Responsible for communicating effectively with the Board and providing, in a timely and accurate manner, all information necessary for the Board to function properly and to make informed decisions.

## 2. FINANCIAL MANAGEMENT

- a. Budget –responsible for creating and maintain an annual budget. The budget is due to the Board at least one month prior to the start of the Fiscal Year. Board member input during the development of the budget is a requirement.
- b. Financial Execution –responsible for managing corporation operations within the approved budget and maintaining accounting records according to General Accepted Accounting Principles. Accurate monthly reports, as required by the Board, are provided to the Board within 10 calendar days of the close of the month.
- c. Audit –ensures that an independent annual audit of corporation finances is conducted each year and published as required by the Board and state law.
- d. Fund Raising: responsible for raising funds to operate the corporation and achieving the goals established by the Board.
- e. Taxes: ensures that all taxes are paid on time and tax filings are met.

3. INTERNAL CONTROLS: The ED/MD ensures that internal controls are established to prevent misuse of any corporate resource and strives to improve corporate efficiency and effectiveness.

## 4. WORKFORCE MANAGEMENT (the term “employee” includes paid and volunteer staff):

- a. Establishes, maintains and operates a performance management system that covers workforce members including employees.
- b. Establishes, maintains and operates a recognition program that covers employees and other workforce members.
- c. Establishes, maintains and operates a volunteer program.
- d. Supervises employees. This includes setting salaries and benefits, (to be approved by the Board in the annual budget), establishing performance plans and preparing performance appraisals, approving time off and taking action to deal with employees and volunteers who may have conduct or performance problems.
- e. Recruits, trains and orients new employees to meet the needs of the organization.
- f. May create an organization leadership structure necessary to ensure employees are properly supervised.

## 5. SERVICE LINE MANAGEMENT AND MARKETING:

a. While the Board determines the organization's service lines, the ED/MD is responsible for managing those product lines for the product line life cycle. This includes creating a life cycle management plan, marketing plan and financial plan associated with each service line in each of the geographies served.

b. Website and CRM System The ED/MD is responsible for overseeing and managing the RMPEX.org website to ensure that the website maintains maximum visibility to served stakeholders and potential customers of RMPEX and provides a state-of-the-art representation to RMPEX to the public. The ED/MD will also oversee the use of Salesforce.com, RMPEX's customer relationship management (CRM) system.

c. Recommends new service lines and changes to existing service lines.

d. At the time this PD was created, the Board of Directors has authorized the following service lines:

(1) Baldrige-based award program. To support this product line, the ED/MD ensures:

- a) award guidance is published annually;
- b) judges and examiners are recruited, trained, organized and effectively led;
- c) manages the judging and examiner process;
- d) notifies award recipients and non-recipients;
- e) orders award elements and verify accurate customization; and
- f) supports Quality of Feedback Reports and review final Feedback reports

(2) An annual conference called QUEST. The ED/MD is responsible for planning and operating the conference.

(3) Scorebook Navigator (tool used to manage Baldrige applications). The ED/MD is responsible for ensuring this tool and its customers are properly supported and that the tool is maintained in with market-confirming technology.

(4) Baldrige Express (diagnostic tool offered jointly with the Alliance for Performance Excellence). The ED/MD is responsible for

working with the Alliance to find implementation sites, coach adopters of the service, and work with consultants assisting use of the service.

(5) Lean Six Sigma (education programs). The ED/MD is responsible for working with the educational partners to develop, launch, and market Lean Six Sigma training.

(6) Beyond Baldrige Member Benefits (member programs complementing Baldrige). The ED/MD is responsible for developing, executing, and updating a membership model that provides value to potential, current, and past award recipients.

#### 6. PLANNING:

a. Develops and maintains a five-year strategic plan that is updated on an annual basis. The plan and any changes are approved by the Board.

b. The strategic plan includes the following major sections:

(1) an overall marketing plan supported by individual service line marketing plans

(2) a draft budget for each of the five years

(3) a draft staffing plan for each of the five years.

c. A rolling annual implementation plan (currently a Hoshin Plan) to be presented to the Board annually and updates are presented at least quarterly.

d. The plan includes appropriate measurable goals reflecting short and long term performance measures.

e. Annually, within 30 calendar days of the end of the fiscal year, the ED/MD ensures that a professional stakeholder report is published that compares corporate performance against planned goals, a financial summary as well as other information that the ED/MD or the Board determines would be of interest to external and internal stakeholders.

7. LEGAL: Ensures that the corporation meets all federal, state and local legal requirements including licenses, taxes and other related filings in the four states in which RMPEX operates.

#### 8. STAKEHOLDER RELATIONS AND NATIONAL LEADERSHIP ROLE:

Serves as a key spokesperson for the organization to external and internal;

stakeholders. The ED/MD develops and maintains positive relationships with stakeholders. The ED/MD is expected to be an active supporter of the Alliance for Performance Excellence and serve on national committees. As determined by the Board, the ED/MD may also be designated as a corporate representative to the Alliance.

## **COMPETENCIES**

***1. Leading Change: the ability to bring about strategic change, both within and outside the organization, to meet organizational goals. Inherent is the ability to establish an organizational vision and to implement it in a continuously changing environment.***

- a. Creativity and Innovation: Develops new insights into situations; questions conventional approaches; encourages new ideas and innovations; designs and implements new or cutting edge programs/processes.
- b. External Awareness: Understands and keeps up-to-date on local, national, and international policies and trends that affect the organization and shape stakeholders' views; is aware of the organization's impact on the external environment.
- c. Flexibility: Is open to change and new information; rapidly adapts to new information, changing conditions, or unexpected obstacles.
- d. Resilience: Deals effectively with pressure; remains optimistic and persistent, even under adversity. Recovers quickly from setbacks.
- e. Strategic Thinking: Formulates objectives and priorities, and implements plans consistent with the long-term interests of the organization in a global environment. Capitalizes on opportunities and manages risks.
- f. Vision: Takes a long-term view and builds a shared vision with others; acts as a catalyst for organizational change. Influences others to translate vision into action.

***2. Leading People: the ability to lead people toward meeting the organization's vision, mission, and goals. The ability to provide an inclusive workplace that fosters the development of others, facilitates cooperation and teamwork, and supports constructive resolution of conflicts.***

- a. Conflict Management: Encourages creative tension and differences of opinions. Anticipates and takes steps to prevent counter-productive confrontations. Manages and resolves conflicts and disagreements in a constructive manner.
- b. Leveraging Diversity: Fosters an inclusive workplace where diversity

and individual differences are valued and leveraged to achieve the vision and mission of the organization.

- c. **Developing Others:** Develops the ability of others to perform and contribute to the organization by providing ongoing feedback and by providing opportunities to learn through formal and informal methods.
- d. **Team Building:** Inspires and fosters team commitment, spirit, pride, and trust. Facilitates cooperation and motivates team members to accomplish group goals.

**3. Results Driven: the ability to meet organizational goals and customer expectations. The ability to make decisions that produce high-quality results by applying technical knowledge, analyzing problems, and calculating risks.**

- a. **Accountability:** Holds self and others accountable for measurable high-quality, timely, and cost-effective results. Determines objectives, sets priorities, and delegates work. Accepts responsibility for mistakes. Complies with established control systems and rules.
- b. **Customer Service:** Anticipates and meets the needs of both internal and external customers. Delivers high-quality products and services; is committed to continuous improvement.
- c. **Decisiveness:** Makes well-informed, effective, and timely decisions, even when data are limited or solutions produce unpleasant consequences; perceives the impact and implications of decisions.
- d. **Entrepreneurship:** Positions the organization for future success by identifying new opportunities; builds the organization by developing or improving products or services. Takes calculated risks to accomplish organizational objectives.
- e. **Problem Solving:** Identifies and analyzes problems; weighs relevance and accuracy of information; generates and evaluates alternative solutions; makes recommendations.
- f. **Technical Credibility:** Understands and appropriately applies principles, procedures, requirements, regulations, and policies related to specialized expertise.

**4. Business Acumen: the ability to manage human, financial, and information resources strategically.**

- a. **Financial Management:** Understands the organization's financial processes. Prepares, justifies, and administers the program budget. Oversees procurement and contracting to achieve desired results. Monitors expenditures and uses cost-benefit thinking to set priorities.
- b. **Human Capital Management:** Builds and manages workforce based on organizational goals, budget considerations, and staffing needs.

Ensures that employees are appropriately recruited, selected, appraised, and rewarded; takes action to address performance problems. Manages a multi-sector workforce and a variety of work situations.

- c. Technology Management: Keeps up-to-date on technological developments. Makes effective use of technology to achieve results. Ensures access to and security of technology systems.
- d. Interpersonal Skills: Treats others with courtesy, sensitivity, and respect. Considers and responds appropriately to the needs and feelings of different people in different situations.
- e. Oral Communication: Makes clear and convincing oral presentations. Listens effectively; clarifies information as needed.
- f. Integrity/Honesty: Behaves in an honest, fair, and ethical manner. Shows consistency in words and actions. Models high standards of ethics.
- g. Written Communication: Writes in a clear, concise, organized, and convincing manner for the intended audience.
- h. Continual Learning: Assesses and recognizes own strengths and weaknesses; pursues self-development.

***5. Building Coalitions: The ability to build coalitions internally and with other Federal agencies, State and local governments, nonprofit and private sector organizations, foreign governments, or international organizations to achieve common goals.***

- a. Partnering: Develops networks and builds alliances; collaborates across boundaries to build strategic relationships and achieve common goals.
- b. Political Savvy: Identifies the internal and external politics that impact the work of the organization. Perceives organizational and political reality and acts accordingly.
- c. Influencing/Negotiating: Persuades others; builds consensus through give and take; gains cooperation from others to obtain information and accomplish goals.

**REQUIRED KNOWLEDGE AND EXPERIENCE:**

- a. A bachelor's degree / Advanced degree preferred
- b. Five or more years of Executive/Managing management experience
- c. Fund-raising, grant proposal writing and foundation relationships
- d. Continuous improvement programs such as Six Sigma, ISO, Baldrige National Quality Program, EFQM, or other U.S. state sponsored quality programs and initiatives

**PREFERRED KNOWLEDGE AND EXPERIENCE:** Served as a national or state Baldrige examiner or equivalent role