



**Policy Wise**  
for Children & Families



# EXECUTIVE BRIEF

## Chief Executive Officer



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### FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of PolicyWise for Children and Families. For more information about this leadership opportunity, please contact Samantha David, Associate Vice President, KCI Search + Talent or Mia Gardiner, Senior Search Consultant by email at [PolicyWise@kcitalent.com](mailto:PolicyWise@kcitalent.com)

All inquiries and applications will be held in strict confidence. Interested candidates should send their resume and letter of interest to the email address listed above by **April 3, 2023**.

*Please note that the target salary range for this role is \$225,000 to \$250,000 including an excellent benefits program.*

PolicyWise is committed to diversity, equity and inclusion and welcomes the unique contributions that candidates of diverse backgrounds and lived experiences can bring and encourages applications that represent the diversity of the communities we serve.

PolicyWise values teamwork, collaboration, and the benefits of working together in an office setting while recognizing that working from home can also be a productive work environment. PolicyWise employees have the flexibility to work from home up to 50% of the time on a rolling two-week period.

The CEO will be expected to attend events, meetings, and travel, on behalf of PolicyWise. Where proof of vaccination is required, the CEO will be expected to provide such proof and fulfill their duties.



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## Chief Executive Officer

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### THE OPPORTUNITY

PolicyWise is seeking a highly strategic and collaborative CEO to lead our organization, that has enriched the lives of children, youth and families through research, data analysis and evaluation services for over 20 years.

Reporting to the Board of Directors and leading a staff team of 35, the new CEO will use their senior leadership experience and strong business acumen to oversee and strategically position operations, evolve our unique value proposition and drive new business development to build our social enterprise. Employing a growth mindset, the successful candidate will leverage our culture of innovation to diversify and increase revenue while ensuring the values and exemplary reputation of PolicyWise are maintained. A thought leader with experience in research and evaluation, the new CEO will translate research and research results into compelling stories that engage new audiences and elevate our brand profile.



Diplomatic but also bold in their approach, the new CEO will be exceptional at building internal and external relationships and will strategically map out a plan to maintain and cultivate relationships with government, the non-profit sector, businesses, and others to meet our strategic objectives.

An experienced leader of teams with the ability to bring people together, the new CEO will work collaboratively with the senior leadership team to coach and develop our dedicated staff team towards the next stage of PolicyWise's development.

This is an exciting time to join PolicyWise. With 30+ projects annually we are poised for growth provincially and nationally.

PolicyWise has office locations in Edmonton and Calgary. The new CEO has the option of a homebase in either centre, but must be willing to travel to both locations and attend activities in other locations as required.



## ABOUT POLICYWISE

### VISION

Children, youth, and families thrive in respectful, safe, and supportive environments shaped by wise decisions.

### MISSION

To inform, identify, and promote effective social policy and practice to improve the well-being of children, youth, families, and communities. We meet people where they are. We work with clients to clearly define the issues that they need to address, or opportunities they want to seize. Together, we ensure high quality evidence that informs wise decisions.

### VALUES

- Learning, insight, and understanding
- Partnership and collaboration
- Contribution and impact
- Service and generosity
- Equity, diversity, and inclusion



### APPROACH

We play an active role in connecting people with evidence, which in turn helps to inform policy and practice. Our intent is that the knowledge we generate in collaboration with our partners, clients, and stakeholders is shared, used, and has a positive impact.



### BACKGROUND

PolicyWise has a long, deep history that started in 2002 when the Government of Alberta recognized that healthy, thriving children living in supportive families and safe communities are critical to ensure a skilled and productive workforce for the future. It was also recognized that there were significant gaps in the applied research available to support the development of effective policies, programs and services for Alberta's children, families, and communities.

Our organization was established in 2003 with the announcement of Alberta’s Promise during the throne speech as the government’s commitment to operationalize the fifth Promise to Alberta’s Children – “Leadership and Innovation”. The Minister of Children’s Services and key leaders in the community along with universities established PolicyWise’s governance structure and established the organization as provider of an inclusive, cross-sector approach to develop best practices and research strategies that support Alberta’s children to learn and succeed.

Since its inception, PolicyWise has been working with governments and social sector organizations serving children, youth and families to develop custom approaches to help clients gain knowledge, evaluate programs and services, and manage data.

Over the years, PolicyWise remained committed to the original mandate and grew in expertise and impact. The organization has had partnerships with government, academic institutions, and communities on significant initiatives such as:

- The Child and Youth Data Lab linking longitudinal data from a wide range of service areas such as health, education, justice, disability and income support, and foster care.
- A research data repository and analytics platform in partnership with academic institutions.
- The design, implementation and management of numerous evaluations; each being unique in subject matter, methodology, scope, and scale.
- Participation in major social policy initiatives, advisory councils, and provincial and national committees since its inception, aimed at improving the well-being of children, families, and communities.

## SERVICES

### Research & Evaluation

- Environmental Scans
- Tools and Method Development
- Evaluation

PolicyWise has industry-leading expertise to evaluate the policies and programs and create processes to analyze data for organizations serving children, youth, and families. PolicyWise works closely with clients to develop a project that reflects the current context, supports learning and innovation; and promotes leading, promising, and emerging practices. A range of methods are used, such as environmental scans, jurisdictional reviews, data audits, literature reviews, and most importantly, direct inquiry with organizations and their key clients and community. PolicyWise then synthesizes the findings in a robust, actionable report.



### Data Analytics Support

- Data Analysis
- Data Management
- Data Integration & Linkage

Information is at the heart of most organizations. Timely, useful data is essential to properly plan and run programs and offer relevant services. PolicyWise works with teams to understand how organizations currently collect and use data and assess whether it’s working efficiently.

PolicyWise will work directly with clients to review their existing practices, optimize processes, develop and implement strategies that link data across the organization. Along the way, PolicyWise will help the organization build internal capacity to manage, analyze and apply their data.

## Capacity Building

- Training
- Capacity Building
- Implementation Support
- Knowledge Mobilization

Through training and coaching, PolicyWise will work with clients to create processes that make better use of evidence to support policy and program decisions. We want to help our clients ask the right questions, collect the data they need, make sense of that data, draw informed conclusions, and feel confident with their decisions. For PolicyWise, capacity building is an integral part of every project. PolicyWise can also work with clients to create tailored learning experiences.

## Framework & Strategy Development

- Framework
- Strategy
- Governance

PolicyWise works with clients to build 'blueprints' that help to guide future action. These tools are based on theory and practice and describe the essential considerations for moving forward. Clients bring the context and understanding of their organization, and PolicyWise brings an objective 'outside eye' to guide and create a custom strategy that's right for them. Whether for evaluation, implementation, governance or strategy development, together we will create a roadmap that's ready for action.

## Consulting & Speaking

- Consulting
- Speaking
- Advising

Over the years, PolicyWise has amassed a strong body of knowledge related to services for children, youth and families. PolicyWise's subject matter experts are available to consult or speak to groups or conferences. PolicyWise also participates as advisors on policy committees or advisory groups to help inform the evolution of social policy.



## BOARD OF DIRECTORS

**Dr. Robbie Babins-Wagner**

**Amanda Broos**

**Stacey Gellatly**, Strategic Advisory Committee Chair

**James Grattan**, Finance, Investment & Audit Committee Chair

**Angela Logan**

**Michelle Okere**, Vice-Chair

**Mark Razzolini**

**Rod Rode**, Governance Committee Chair

**Dr. Jackie Sieppert**, Chair

**Cheryl Whiskeyjack**

## ADDITIONAL INFORMATION

- [About PolicyWise](#)
- [PolicyWise Services](#)
- [2021-2023 Strategic Plan](#)
- [PolicyWise Annual Reports & Financials](#)
- [PolicyWise Board of Directors](#)
- [Resources for the Community](#)
- [Latest News](#)

## KEY DUTIES AND RESPONSIBILITIES

### Strategy, Planning & Governance

- Work with the Board to develop and implement the strategic plan.
- Lead the development and execution of the annual business plan, a \$4M+ budget, and business development, ensuring alignment with strategic objectives, vision, mission, and values.
- Identify, assess, and inform the Board of any internal and external risk factors which may affect the organization and its ability to achieve its objectives; and suggest mitigation strategies as appropriate.
- Work with the Chief Financial Officer to ensure proper financial oversight and compliance with all internal and external reporting.
- Keep up to date on charitable and enterprise related knowledge and trends, and strategically use this information to inform organization activities.
- Ensure PolicyWise is compliant with all legislative, legal, regulatory, and ethical standards.
- Keep up to date on charitable and social enterprise related knowledge and trends, and strategically use this information to inform organization activities.
- Coach and partner with Board members to create partnerships and initiatives that align with organization values and goals.
- Support all activities of the Board, attend Board committee meetings, and provide required CEO reports that support Board decisions.
- Support Board recruitment and orientation activities.

### Government, Business & Community Development

- Advance all activities that continue to build PolicyWise as a social enterprise.
- Build strategic relationships with government, the non-profit sector and corporations that support strategic objectives.
- Lead business development activities to drive fee-for service contract procurement to increase revenue and overall sustainability.
- Continue to build the case and unique value proposition that positions the organization as a preferred service provider.
- Lead government relations activities establishing and implementing a short and longer-term strategy for government and external relations that ensures organization sustainability and capitalizes on opportunities for growth.

- Work collaboratively to develop and deliver compelling impact and research reports, using the results to build the brand and profile of PolicyWise while also meeting the requirements of funders, and clients.
- Review revenue streams and build a plan to diversify revenue by introducing fundraising streams that support the organization’s position as a charity of choice.
- Participate on external Committees that provide opportunities to showcase and build the organization profile and help maintain valuable long-standing partnerships.
- Act as the main spokesperson with media, funders, and the community.

## **Operations**

- Oversee and assess operations to ensure the efficient and cost-effective use of its financial, human, and operational resources.
- Model and reinforce organizational values to ensure a healthy organizational culture for staff.
- Work with the staff and the Board to ensure consistent communication of the organizations vision, mission and values internally and externally in a manner that generates excitement and increases engagement and commitment to action.
- Oversee the development and implementation of policies, procedures, systems, and other essential infrastructure that will manage risk and increase the effectiveness and efficiency of operations.
- Work collaboratively with the senior leadership team to lead, inspire, develop, and mentor the staff team within a culture that promotes ethical practices, and ensures delivery on individual and team objectives.
- Attract and retain new staff members as required with the knowledge, skills, energy, and passion to make the mission and vision a reality.
- Coach and mentor the senior leadership team to support annual and strategic goals.
- Work with the COO to manage the creation, execution, reporting and evaluation of existing and new contracts ensuring data integrity, accountability, and transparency in all stages of application, negotiation, implementation, and delivery.
- Work with the COO and HR Director to oversee the provision of human resources including mandatory health, wellness, safety and other required training for staff and volunteers.
- Ensure a performance management process that confirms accountability at all levels of the organization and make course corrections in goals and strategies as necessary.

## **QUALIFICATIONS & KEY COMPETENCIES**

- Progressive senior leadership roles in the public or private sector with strong experience in business development.
- Experience with the analysis, development, delivery, and monitoring of multi-year strategic plans and annual business plans.
- Proven experience with the financial oversight of an organization including procedures, controls, and the ability to analyze, interpret, and present financial reports.
- A history of successful concept and proposal development and the ability to launch and grow fee-based services.
- Exceptional abilities and proven results networking and building strategic relationships across the public and private sectors.



- Excellent, proven ability to evaluate and audit programs and services to strengthen results.
- History of navigating and building unity across diverse audiences and leveraging networks to meet strategic objectives.
- Knowledge of the regulatory and reporting requirements of a charity.
- Proven history of developing and managing highly successful staff teams.
- Knowledge and experience with research, analysis of data, evaluation processes and impact reporting.
- Attention to detail with excellent project and program management skills.
- Excellent written and oral presentation skills with extensive experience as an organization spokesperson.
- Excellent negotiation and mediation skills.
- Knowledge of the issues related to children, youth and families and policy that impacts organizations dedicated to serving vulnerable populations is an asset.
- A post-secondary degree is required, with a post-graduate degree preferred.
- A strong commitment to the values of equity, diversity, inclusivity, and human rights.
- Ability to travel, with regular access to a vehicle.

### Key Competencies

- **Innovating Strategic Initiatives:** advance innovative methodologies, develop a specific plan for achieving long-term objectives, and create a vision for the future direction of the organization.
- **Maximizing Resources:** inspiring staff to achieve the organization's mission and vision, compel others to own the strategic vision, and facilitate identifying, procuring, and dispatching resources as needed.
- **Utilizing Organizational Synergies:** actively cross divisional boundaries to drive efficient operations, draw connections between interrelated functional groups, identify and maximize synergistic assets, and instill innovative systems and procedures that enhance organizational performance.
- **Producing Quality Results:** impart a common understanding of the way goals will be achieved and the scope of effort required to achieve them, prioritize tasks to support realistic objectives, and accomplish market and client-focused solutions.
- **Mentoring Others:** recognize the potential in others, empower others to work and solve problems self-sufficiently, and provide objective performance feedback on a timely basis.
- **Maintaining High Personal Standards:** demonstrate a propensity for engendering trust by keeping promises and confidences, pursuing resources to improve and develop professionally, and demonstrating accountability for the end result of all actions and decisions.

## BIOGRAPHIES

### Dr. Jackie Sieppert, Board Chair



Currently a professor and former Dean for the Faculty of Social Work, University of Calgary, Jackie Sieppert has also worked at the Faculty of Social Work as a sessional instructor, teaching computer skills and statistics. After obtaining his PhD, he rejoined the Faculty as an assistant professor in 1993, teaching courses in program evaluation, research, organizational practice, and social policy. Since that time he has also served as PhD Coordinator and Associate Dean, Research and Partnerships. Jackie's research interests include community development with seniors, dynamics of successful collaboration, and digital storytelling. Jackie spent a decade as Dean, focusing particularly on leading the Faculty to create unique, modular graduate programs and driving a focus on community-grounded research.

### Michelle Okere, Board Vice-Chair



Michelle Okere is an entrepreneur and former CEO of Compassion House Foundation, a non-profit dedicated to easing the distress of the cancer journey. She is a Certified Fund Raising Executive (CFRE) with over a decade of experience leading the growth of national, provincial, and local non-profit organizations. Michelle is recognized for her expertise in fund development; public relations; national, provincial, and municipal advocacy; strategic and operations planning; and human resources, with a focus on equity, diversity, and inclusion. Since 2016, Michelle has been working with non-profits, Foundations, and social enterprises across western Canada to support transformational growth through her consulting company - Okere & Associates. Passionate about community engagement, Michelle has been featured in PINK Magazine for her work in rural communities, received the Deputy Minister's Award for Innovation in Saskatchewan for a cross-sector fundraising and awareness campaign, and was recently awarded with a Paul Harris Fellow for exemplary service above self.

# ORGANIZATIONAL CHART

