

**The Right Process
The Right Perspectives
The Right Compensation
for Your Institution's
Leaders and Staff**

Bridging fairness with compensation strategies, planning and benefit structures for non-profit organizations and independent schools

**CALFEE
FINANCIAL®**



Prosperity Perpetuation®

Concepts, Strategy & Management

www.calfee-compensation.com

Compensation for Your Institution's Leaders and Staff

Get compensation and benefits for your organization right, and everyone—board, staff and executive director, president or head—works in concert to lead your institution and achieve its unique strategic vision.

Get it wrong? When leadership and staff are de-motivated and the board resentful, the consequences can be significant.



Motivation for a positive culture and environment erodes. Fully-qualified and retainable individuals depart. Momentum for strategic initiatives—fundraising campaigns, endowment development and new construction—dissipates. There is a potentially lingering loss of focus, time and opportunity as day-to-day morale, and the institution, declines.



The solution?

Fair compensation that bridges the interests of all parties.

Typically, board members and organization leaders are uncomfortable with compensation negotiations. Many do not understand, appreciate or embrace the issues, possibilities and ramifications. And everyone differs as to what is "FAIR."

Fortunately, with the right process, you can engineer successful, lasting and practical compensation and benefits packages for your leadership and staff.

As a board, you want the president, head or executive director to lead, guide, nurture—and stay. You need to understand the foundation for compensation agreements and be confident leaders and staff will vigorously pursue your organization's mission.



As president, head or executive director, you want to stay and contribute to your institution or school. You must feel you have the support of the board and your personal, financial and family needs are meaningfully addressed.

Together, you desire to come to agreement on a compensation program that builds the bridge to what all see as fair—because the goal is longevity of service.





A Process for Bridging Fairness

Significant Responsibilities, High Expectations

Much like the CEOs of for-profit multi-million dollar operations, leaders of non-profit institutions manage substantial enterprises. These are demanding positions with many challenges:

- “Profit and loss” responsibilities including day-to-day management of operations.
- Communication with constituents as to the value of your institution.
- Expectations to attract, retain and continually motivate faculty, staff or administrators.
- Raising capital and monitoring all financing issues.
- Development of endowment resources.
- Government-mandated benefit and retirement requirements.
- Long-range strategic planning.

Bridging Differing Starting Points

Initially, no organization head or board chair defines fair the same. Calfee Financial will assist your organization in bridging these positions to provide a win-win solution. There is no “zero-sum” aspect to what we do.

The goal is to arrive collegially at an agreement that satisfies all parties. This enables everyone to focus on carrying out the institution’s mission and vision.

The Calfee Financial Process

We are retained by boards to assist in the development of compensation, salary, benefit and incentive programs for leaders, key staff and the entire institution. The Calfee Financial Process is:

- **Specific:** We visit your institution and meet with the executive director, president or head, the board and other committees and parties you feel will provide insight. We learn your culture and history. We ask questions—and we listen.
- **Strategic:** We ask about the mission and strategic planning for the institution and how the compensation philosophy and programs can better enable you to achieve your goals.
- **Open and collaborative:** Our services are designed to build a supportive advocacy relationship in which everyone's interests are represented. We will not enter into an adversarial relationship. The board should understand the reasoning behind the compensation program as the organization leader should understand the board's expectations.
- **Methodical:** The process of crafting compensation philosophies and packages gains in credibility with careful and judicious vetting of opinions and provision for input from all vested parties. We devote the hours required to develop, with the appropriate board committees, the time line for review of compensation and benefit packages.
- **Wide-ranging:** We conduct a comprehensive study of current compensation and benefit packages for competitive analysis and market comparison based on current needs and projected future requirements. We help you decipher the complexities and possibilities of compensation.

Who we serve

- Foundations
- Non-profits
- Civic organizations
- Private schools
- Montessori schools
- Charter schools
- Other institutions

Every Institution is Unique, Requiring Individualized Solutions

No two institutions, leaders or situations are the same. Your compensation and benefits philosophy should be tailored accordingly.

You need more than a well-crafted compensation agreement—you need a process, a framework, which fosters accord and unreservedly embraces your distinctive culture and vision. A process that: is transparent, collaborative, strategic, practical and creative; and fully embraces the unique culture, history, values, needs and mission of your institution apart from national averages, “competitive” research, grids, matrices and surveys.

Bring that framework to your institution with Calfee Financial. We provide the open and individualized methodology and process that enables your institution to build strategic and lasting compensation philosophies and programs.

For More on Our Qualifications

For more details on our nearly three decades of business, non-profit and planning experience, extensive financial and benefits planning expertise, and intimate knowledge of the workings of institutions and independent schools, please call us or visit www.calfee-compensation.com.

Peter H. Calfee

Peter H. Calfee, CPA, CFP, CLU, AEP, MBA, is President and Owner of Calfee Financial Advisors, Inc. He speaks on total compensation and benefits issues at regional and national conferences and other forums across the country.



Mr. Calfee has contributed to the successful creation of fair compensation packages for many organizations. Visit www.calfee-compensation.com for a current list,.

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