



## Pennsylvania Assistive Technology Foundation

Chief Executive Officer

### General Description:

Pennsylvania Assistive Technology Foundation (PATF) is a statewide non-profit organization. Its mission is to provide education and financing opportunities, and advocacy for people with disabilities and older Pennsylvanians, helping them to acquire the assistive technology (AT) devices and services that improve the quality of their lives. Founded in 1998, PATF is Pennsylvania's Alternative Financing Program (AFP) as designated by the federal Assistive Technology Act. A leader in the AFP network, both in terms of program development and numbers of people helped, PATF has provided technical assistance to more than 2/3rds of the 42 AFPs in other states and territories.

In the past 24 years, PATF has helped more than 4,400 individuals with disabilities and their families finance the AT they need through no-interest and low-interest loans worth more than \$44 million. In 2012, PATF became a state-accredited and federally-certified Community Development Financial Institution (CDFI), a designation awarded to organizations that have financial products and services that positively impact low-wealth communities. PATF was the nation's first AFP to receive grant funding as a CDFI. In 2021, PATF's leadership was awarded Opportunity Finance Network's Lifetime Achievement Award honoring its advocacy and pioneering financing work in the disability community.

PATF has also helped more than 21,200 individuals with Information & Assistance services. In the last three years, these services saved borrowers \$2.1M by providing information about additional public and private funding resources for their AT. Staff also helped save millions of dollars for countless other individuals by referring them to funding resources – which meant they didn't need a loan at all. In 2021, PATF published Smart Homes Made Simple: Your Guide to Smart Home Technology and launched its companion website, [SmartHomesMadeSimple.org](http://SmartHomesMadeSimple.org), to help individuals with disabilities and older adults learn about mainstream, off-the-shelf smart home devices and how they can be financed. This is the first such publication produced for the disability community. In March, PATF hosted a webinar, *Real-Life Stories: Using Smart Home Technology for Independence*, in which more than 500 people participated from around the world.

PATF has also created the first comprehensive financial education curriculum for individuals with disabilities, Cents and Sensibility: A Guide to Money Management and its companion website, [StudyMoney.us](http://StudyMoney.us). The revision of the educator's manual will be completed in the summer, 2022. PATF has provided more than 17,000 individuals with financial education information and/or one-on-one financial coaching. In recognition of this work, PATF was awarded the Non-Profit Organization of the Year with the 2021 Excellence in Financial Literacy Education (EIFLE) Award.

Also, in 2021, PATF created a wholly-owned subsidiary, Appalachian Assistive Technology Loan Fund (AATLF) to expand microfinancing opportunities for individuals with disabilities in the Appalachian region. Now that it has received a technical assistance grant from the CDFI Fund, AATLF will launch a pilot loan program in nearby states beginning in the fall of 2022. AATLF is awaiting CDFI certification by the U.S. Treasury.

PATF's mission and values are rooted in diversity, equity, inclusion, and accessibility. As a racially, culturally, gender, and disability diverse community, we have strived to reflect these values in our work. A majority of both Board and staff are individuals with disabilities and/or immediate family members. To ensure that PATF is serving our community in accordance with our ideals of social, racial, and economic justice, PATF will continue to engage in rigorous self-examination. PATF's Board and staff are prioritizing this work through diversity and equity-focused initiatives, as well as actively seeking out leaders whose experiences – both professional and personal – will support PATF's ongoing work in this area.

Reporting to the Board of Directors, the CEO will have overall management responsibility for growing an impactful organization with an annual operating budget of \$1.8 million, a \$2 million annual loan portfolio, with 13 employees and 6 subcontractors.

PATF's office is located in King of Prussia, Pennsylvania. PATF has adopted a hybrid work environment. The CEO must have a presence in the King of Prussia office.

### **Essential Attributes:**

The CEO leads with honesty, integrity, trust, fairness, accountability, strategic thought, and perseverance.

The CEO is a recognized creative and visionary leader in education, financing, and advocacy for all individuals with disabilities and older Pennsylvanians so that they can acquire assistive technology devices and services that improve the quality of their lives.

The CEO ensures PATF remains relevant and thrives into the future through developing and implementing policies, procedures, and actions, to meet the emerging technology needs of individuals with disabilities and older Pennsylvanians.

The CEO develops and implements new methods of financing, education, and advocacy to continually increase opportunities for independence, education, employment, and community inclusion.

The CEO is a leader in partnering and collaborating with other organizations, both nonprofit and for-profit; the CEO also educates government administrators and legislators at local, state, and national levels on proposed regulations and legislation.

### **POSITION OVERVIEW:**

This position requires a dynamic, mission-driven leader who is passionate about leading hands-on operations and fostering growth in all the above areas, as well as developing policies, procedures, and actions to meet the emerging needs of people with disabilities to continually increase opportunities for independence, education, employment, and community inclusion.

The CEO will manage the administration, programs, and strategic plan of the organization as they relate to PATF's four main concentrations:

- Developing and funding innovative loan programs to help its constituents finance the purchase of assistive technology,

- Educating its constituents about available assistive technology funding resources,
- Developing materials and educating its constituents about personal financial management for the unique challenges of people with disabilities,
- Advocacy on behalf of people with disabilities at the local, state, and national levels.

**POSITION RESPONSIBILITIES:**

- Lead PATF in a manner that supports and guides the organization’s mission.
- Manage PATF’s operations to ensure that it is making consistent and timely progress in achieving its mission and meeting targeted goals. This includes hiring, supervising, and mentoring the Lending and Operations Director, Strategic Initiatives Director, and the Financial Manager.
- Provide leadership in developing program, organizational, and financial plans, including improving existing and creating new programs.
- Communicate effectively with the Board. Attend all Board meetings and provide reports and updates on staff as well as all current work, project timelines, and project and organizational progress.
- Advocate at the local, state, and national levels for financial empowerment and access to assistive technology for people with disabilities. This includes building coalitions with like-minded organizations, maintaining positive relationships with policymakers, monitoring, and influencing legislative and other initiatives that could affect PATF and its constituency.
- Drive development and fundraising for PATF’s programs. This includes co-writing and editing grant proposals as well as designing and executing campaigns to maintain or increase the funding from state and federal appropriations, and campaigns for individual donations.
- Ensure the financial soundness of PATF. This includes development of and adherence to a financial plan and balanced budget, timely filing of reports and contracts, maintenance of safeguards for disbursing organization funds, ensuring that bookkeeping, forecasting, and record-keeping meet relevant standards, development and adherence to financial policies and procedures and ensuring independent financial audits.
- Effectively represent the organization and promote a positive organizational image. Includes managing the development and execution of an annual outreach and marketing plan in support of PATF’s strategic plan.

**COMPETENCIES:**

1. Make Sound Decisions
  - a. Recognizes the broad, systemic implications of problems and issues.
  - b. Focuses on the crux of issues and identifies high-leverage intervention points and strategies.
  - c. Critically and logically evaluates the costs, risks, and benefits of alternatives before making decisions.
  - d. Makes decisions in the face of uncertainty.
2. Be Strategic
  - a. Develops responses to key environmental actions and threats.
  - b. Identifies and integrates organizational strategies to achieve and sustain influence and visibility.
  - c. Develops strategies that leverage the core capabilities and competencies of the organization.

3. Accountability/Optimize Execution
  - a. Uses key indicators, processes, and management systems to monitor the organization's performance against goals.
  - b. Addresses barriers to achieving results and sources of lagging performance.
  - c. Ensures accountability for achieving organization goals at multiple organizational levels.
  - d. Maintains operating effectiveness while simultaneously driving needed change.
4. Show Drive and Initiative
  - a. Establishes aggressive goals for the organization.
  - b. Gets results that have a clear, positive, and direct impact on organization performance.
  - c. Conveys a strong sense of urgency and drives issues to closure.
  - d. Manages focused, results-oriented meetings that achieve closure on key issues.
5. Develop/Support Organization Talent
  - a. Shapes roles and assignments in ways that leverage and develop people's capabilities.
  - b. Develops successors and talent pools to ensure availability of future talent.
  - c. Provides feedback, coaching, and guidance where appropriate to enhance others' skill development.
  - d. Identifies and attracts key individuals with the critical capabilities needed by the organization.
6. Ensure Collaboration
  - a. Builds collaboration by establishing, communicating, and reinforcing shared values and norms.
  - b. Promotes a culture of collaboration and teamwork across organizational boundaries.
  - c. Supports an office environment that is responsive, knowledgeable, compassionate, and productive.
  - d. Removes organizational barriers to collaboration and teamwork.

**DESIRED QUALIFICATIONS:**

The ideal candidate for this role will be a strategic, sound decision maker who demonstrates drive and initiative, holds self and others accountable for results, can identify and remove roadblocks to performance, identifies and develops organizational talent through coaching and feedback and promotes a culture of collaboration while fostering a responsive, competent, compassionate, and productive office environment. Specifically, the position requires:

- A master's degree in political science, public administration, social work, finance, or related disciplines.
- Ten or more years' senior non-profit leadership and management experience.
- Personal or professional subject matter expertise in aging and disability (e.g., intellectual disability, physical disability, cognitive disability, and related disabilities.)
- Practical knowledge and substantive experience on the topics within economic development and finance.
- Substantial knowledge of services and supports for individuals with disabilities, including home and community-based waiver programs, employment, and healthcare programs.

- Substantial knowledge and experience in government relations and the public policy-making process.
- Solid, hands-on, budget management skills, including budget preparation, analysis, decision-making, and reporting.
- Strong organizational abilities including planning, delegating, program development and task facilitation.
- Excellent written and oral communication, including strong public speaking, and relationship-building skills with an ability to prioritize, negotiate, and work with all members of the organization, partners, and disability community.
- Available to travel.
- Valid driver's license.
- Ability to use a mobile communication device, a personal computer and standard Microsoft Office business applications.
- Ability to meet requirements to register as a lobbyist in the Commonwealth of Pennsylvania.

PATF is an Equal Opportunity Employer (EOE). PATF is committed to a policy of non-discrimination in employment to all employees and applicants for employment. No person shall experience discrimination in employment because of such individual's race, religion, color, sex, age, sexual preference, national origin, or disability.