



CARLSONBECK

EXECUTIVE SEARCH FOR PHILANTHROPY & NONPROFITS

## Position Specification



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## Executive Director

11 July 2024, vF



Carlson Beck advises **Lowell Observatory** on the basis of an exclusive consulting assignment. The following details are for your information and should be shared with discretion.



## POSITION SPECIFICATION

**THE POSITION:** EXECUTIVE DIRECTOR

**REPORTS TO:** SOLE TRUSTEE

**LOCATION:** FLAGSTAFF, ARIZONA

### OVERVIEW

#### *The Mission*

The mission of Lowell Observatory is to pursue the study of astronomy, especially the study of the solar system and its evolution; to conduct pure research in astronomical phenomena; and to maintain quality public education and outreach programs to bring the results of astronomical research to the general public.

#### *The Organization*

Lowell Observatory (“Lowell” or “the Observatory”) is a private, non-profit research institution dedicated to communicating its astronomical discoveries to a broad audience of research scientists and individuals of all ages. The Observatory has grown significantly in the past 10 years, with the completion of its 4.3-meter Lowell Discovery Telescope (“LDT”) and the Giovale Open Deck Observatory.

Lowell Observatory was established in 1894, placing it among the oldest observatories in the United States, and was designated a National Historic Landmark in 1965. In 2011, the Observatory was named one of "The World's 100 Most Important Places" by Time Magazine. It was at Lowell Observatory that the dwarf planet Pluto was discovered in 1930 by Clyde Tombaugh.

Current Lowell research spans much of astronomy and planetary science, including the study of small solar system bodies, star formation, the evolution and variations of massive stars and cool stars, exoplanets, and galactic formation and evolution. Lowell Observatory is the sole owner and operator of the 4.3-meter, \$53M Lowell Discovery Telescope (“LDT”), which entered full operation in 2015. Lowell has collaborated with several partners in access to the LDT including Boston University, the University of Maryland, the University of Toledo, Northern Arizona University (“NAU”), Yale University, the University of Texas, and the Korea Astronomy and Space Science Institute. Lowell astronomers have long-term access to the Observatory's observing facilities, enabling time-domain programs across all research interests that would be difficult to impossible to carry out elsewhere. Lowell astronomers are also highly collaborative with fellow researchers around the globe and make regular use of other observing facilities both on earth and in space. A robust set of research internships with NAU undergraduates, as well as the Percival Lowell Postdoctoral Fellowship program, is expanding Lowell's support for young and early-career researchers. A well-equipped instrument shop enables Lowell's technical team to build and maintain much of its astronomical instrumentation in-house. For example, the LDT's innovative RC instrument cube was designed and built by the Lowell technical team.



Meanwhile, more than 100,000 visitors come to the Mars Hill campus each year to explore space for themselves by looking through telescopes, gazing at the star-spangled skies as educators point out celestial features, and listening to experts explain the wonders of the cosmos.

The opening of the \$53 million, 40,000-square-foot Kemper and Ethel Marley Foundation Astronomy Discovery Center in late 2024 will further expand the Observatory's influence and impact. Lowell's vision for this facility is that it will be the premier public astronomy education destination in the world.

The Observatory is overseen by a Sole Trustee ("the Trustee"), a position historically handed down through the Lowell family. In addition to the Sole Trustee, there is also a robust Advisory Board and a Lowell Observatory Foundation that bring experts and individuals from throughout the country to help shape and support the future of the institution. The Observatory currently employs 112 full-time and 32 part-time employees.

For more information on the organization, visit [www.lowell.edu](http://www.lowell.edu).

## THE POSITION

Lowell Observatory's Executive Director is the senior most individual responsible for all aspects of the Observatory's success. As the leader of a dynamic team of individuals, the Executive Director will articulate the unique vision of the institution both within the Lowell Observatory community and with constituencies throughout the scientific, educational and governmental communities as well as the general public. The expectation is that this individual will help shape the strategic vision of the institution setting aspirational goals for all aspects of the organization. The Executive Director will align Lowell's mission and the business model, ensuring the latter supports the former.


The Executive Director will be responsible for leading the team on the mission of advancing the Observatory's accomplishments and impact in research and education. Perhaps the first opportunity for the new leader to raise the profile will be preparing and leading the Observatory staff through the initial phase of operations of the Marley Foundation Astronomy Discovery Center ("ADC") in late 2024. The opening of the ADC represents an inflection point of growth for the Observatory's business operations, public education programs, scientific research capabilities and, ultimately, revenue generation to fund future projects. The expansion potential for Lowell is exciting as the ADC provides the financial means to increase visitors, membership, partnerships, educational programs, and science and technology programs. The other major critical opportunity for the new leader will be the development and implementation of the Observatory's new scientific and technical vision for the next 10-20 years.

The Executive Director will be expected to maintain the culture of "us" at the Observatory, a culture that values collaboration, integrity, curiosity, intellectual rigor, and friendliness. It is a culture where taking a risk on a grand idea has paid off and where astronomers have the tools and peer support to do their life's work.

## RESPONSIBILITIES

The Executive Director oversees all aspects of the Observatory's operation. While the details and authority for executing many tasks are delegated, the Executive Director is responsible for the following areas:

- **Strategy and Vision** -- the operational structure and highest-level goals of the institution
- **Science and Technology** -- the scientific vitality and direction of Lowell Observatory
- **Outreach** -- the success and credibility of the outreach programs

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- **Finances** -- the fiscal health of the institution
  - **Fundraising** -- the expansion of philanthropic support for Lowell
  - **Image** -- the image of the institution to the lay and professional communities

Additional details on these areas are below.

### **STRATEGY AND VISION**

The Executive Director is expected to establish the strategic vision of Lowell Observatory in concert with other interested parties. He/she will help shape the Observatory's Strategic Plan, Campus Master Plan, Science and Technical Vision, and other strategic initiatives, and will instigate and guide the expected periodic reviews of the Plans, delegating details of reviews to the Chief Operating Officer ("COO") or additional staff as appropriate.

Working with the COO, the Executive Leadership team, and the Trustee, the Executive Director will determine the operational structure of the institution, evaluate the human and capital resources required to meet goals, and participate in recruitment and approve hiring of staff, when appropriate.

The Executive Director will work with the Trustee, the Advisory Board (in particular the Executive Committee), the Executive Leadership team, and the staff to ensure that the institution remains focused on its mission and its goals as outlined in its various Plans.

### **SCIENCE AND TECHNOLOGY**

The Executive Director will work collaboratively with the Director of Science and the Director of Technology in guiding the scientific and technical direction of the Observatory as presented in the Science and Technical Vision. The Executive Director will work in concert with the Director of Science as needed in recruitment and management of the Observatory's scientific partners, particularly in regard to access on the Lowell Discovery Telescope.

As other duties of the position permit, the Executive Director may, but is not required to, maintain a research program in any areas of scientific interest. Direct interaction with scientific and technical staff in the furtherance of any such programs is appropriate and encouraged.

### **OUTREACH**

The Executive Director is expected to delegate operational details of the outreach program to the Director of Education. The Executive Director will work to support (and to the extent appropriate and practical, contribute to the development and definition of) the outreach components of the Strategic Plan, new projects and initiatives as presented by the Chief Operating Officer and outreach management (especially in connection with the Astronomy Discovery Center), and the yearly operational targets. The Executive Director is expected to participate on occasion in the Observatory's outreach activities and to represent the Observatory clearly and effectively to the public.

### **FINANCES**

The Executive Director is expected to delegate details of the operating budget, accounting, auditing, and Federal compliance to the Chief Financial Officer ("CFO"). The Executive Director will approve the annual budget and will work with the CFO and COO as needed in its development for appropriate departments. The Executive Director is responsible for keeping the Trustee informed regularly about the Observatory's performance against its budget and operational goals.



The Executive Director will work with the Trustee, the Chief Philanthropy Officer, and the Chief Financial Officer to maintain communication and understanding of the state of the Percival Lowell Trust, the Lowell Observatory Foundation, and the Observatory's investments. The Executive Director will maintain currency on all aspects of the Observatory's operational status to provide guidance to the Trustee regarding operational cash needs against management of investments with the Observatory's financial managers.

### **FUNDRAISING**

It is expected that the Executive Director will regularly and effectively work with the Chief Philanthropy Officer ("CPO") and the Philanthropy team in representing the Observatory to donors of any type or level, and that this representation will have a measurable impact on the success of Lowell's philanthropic efforts. The Executive Director's participation in specific efforts, events, meetings, or other development activities will be determined in concert with the CPO. Due to the importance of philanthropic revenue to the Observatory, the expectation by major donors of engagement from the highest levels of Observatory leadership, and the magnitude of the 10- to 20-year campaign goals associated with the Observatory's Scientific and Technical Vision, these duties are expected to take a significant portion of the Executive Director's time.

### **IMAGE**

The Executive Director is expected to perform activities in service to the astronomical community and professional societies, to Arizona, and to Flagstaff. Such activities may include, but are not limited to:

- Service to professional organizations and agencies – these include NASA, NSF, AURA, the AAS and the IAU;
- Advocacy for astronomical interests for observatories – at all levels in the U.S. government at local, state, and federal levels, in appropriate capacities; and
- Community service and representation of Observatory interests – providing service to and working with local organizations such as the Northern Arizona Leadership Alliance, the Flagstaff STEM City consortium, the Flagstaff Dark Skies Coalition, and/or other entities as appropriate; additionally, representing the Observatory to Flagstaff organizations and City staff, to the Flagstaff City Council and Coconino County Board of Supervisors, and to State and Federal elected officials.

### **THE OPPORTUNITY**

The Executive Director will be joining Lowell Observatory at a critical and exciting time in its history. The ADC builds the Observatory's reputation as a world-class destination for accessibility, astronomical education, field research, and technical learning as well as programs. It will be a premier place for events, convenings, symposia, and gatherings to further the fields of astronomy and planetary science as well as other sciences. It enhances Lowell Observatory's standing on the world stage of astronomical destinations. The multiple aspects of the Observatory campus offer an unparalleled opportunity for the Executive Director and team to lead the visitor experience for both researchers, scientists, passionate lay astronomers, and casual stargazers to have a unique experience that only Lowell Observatory can offer. At the same time, the new scientific and technical vision leverages the Observatory's expanded capacity and prepares it for an exciting period of growth and prominence as a leading center of research in astronomy and planetary science. This Executive Director position is a unique opportunity to lead an institution that is advancing scientific research as well as impacting STEM education. It is extremely rare to have the opportunity to hold a position that has a place in the historical scientific lineage – from the founder Percival Lowell to the future of astronomy worldwide. This is an opportunity to be part of an inspiring trajectory, offering immediate and sustained intellectual and soulful gratification and impact.



## CANDIDATE QUALIFICATIONS / EXPERIENCE

**Education:** The preferred Executive Director candidate will have a Ph.D. in astronomy, planetary science, or a related field, along with a record of published, peer-reviewed research. Those without a doctorate in the above areas but with exceptional experience will also be considered.

**Experience:** Experience with non-profit organizational and people management, financial and budgetary planning, human resources, and philanthropy is highly desirable. Additional qualifications such as an M.B.A. degree and/or a CFRE (Certified Fundraising Executive) certification, or equivalent demonstrated experience, are advantageous.

## COMPETENCIES / ATTRIBUTES

In order to succeed in the position, compelling candidates will have or be:

- Passionate about the mission and purpose of Lowell Observatory's work; able to serve as an evangelist of the work to the scientific community, donors, peer organizations, visitors, community leaders, funders and industry associations
- Track record of supporting an organizational vision and implementing a strategic plan
- An effective delegator to the COO and Executive Leadership team
- Able to establish clear scopes of responsibility for the COO and the Executive Leadership Team members, specifying the functional areas where these staff (a) may make operational decisions, with or without financial implications, and (b) where recommendations must come to the Executive Director for approval
- Experienced in nonprofit management and leadership
- Familiar with financial management of an organization similar in size and scope as Lowell Observatory
- Adept at team building, talent recruitment and retention, recognizing opportunities for professional development
- Proven experience of working closely and productively with a board chair, serving as a thought partner and engaged and clear communicator
- Familiarity with and, ideally, experience leading through organizational growth and requisite change management

Important criteria for this position are:

- Knowledge, credibility, good standing in the field of astronomy and the scientific community
- Dedication to scientific discovery and outreach
- Excellent communication skills both written and verbal
- People centric, authentic, engaging, and prepared to be an executive leader
- A commitment to supporting infrastructure needs and resources that enable Lowell Observatory's work
- Empathy, kindness, and respect for individuals at all levels
- Ability to deal with conflict, and to make difficult decisions, in a fair, consistent, and timely manner
- Unquestionable professional integrity
- A desire to fundraise, to build relationships and nurture major donors, institutional funders, corporate supporters and grant makers
- Understanding of the subtleties of motivating, managing and directing a team of diverse personalities
- A management style that is accessible and approachable

**It is not necessary to meet all the criteria above to be considered for this critical position.**



## COMPENSATION

This is a full-time, exempt, employment-at-will position reporting to the Sole Trustee. The Executive Director's single direct report is the Chief Operating Officer. Salary is set by the Sole Trustee and is based on performance and on comparative salary analyses conducted regularly by the Observatory's HR department.

Compensation consists of an annual salary ranging from **\$220,000 to \$250,000**, commensurate with experience, plus a comprehensive benefits and Paid Time Off package. Additionally, a spacious **private residence on campus is provided, nontaxable**, with additional storage, exterior services such as snow removal, and breathtaking views from a spacious deck! Information is available on additional benefits.

## WORKING CONDITIONS

- Considerable physical activity at high altitude (7,200 feet), requires walking on uneven ground, climbing flights of stairs and ladders.
- Work involves frequent exposure to unusual elements, such as extreme temperatures, dirt, dust, fumes, smoke, unpleasant odors, and/or loud noises. Some exposure to hazards or physical risk requires adherence to safety precautions.
- No Smoking campus – due to the historic nature of the site, all Lowell Observatory grounds and facilities are smoke-free, at all times.

### **Employment is subject to passing a background check**

Lowell Observatory is proud to be an equal opportunity workplace and is an affirmative action employer. We are committed to equal employment opportunity regardless of race, color, ancestry, religion, sex, national origin, sexual orientation, age, citizenship, marital status, disability, gender identity or Veteran status. Lowell Observatory has always been, and always will be, committed to diversity and inclusion. The institution seeks individuals from all backgrounds to join its teams, and encourages its employees to bring their authentic, original, and best selves to work.

Lowell Observatory sits at the base of mountains sacred to tribes throughout the region. The institution honors their past, present, and future generations, who have lived here for millennia and will forever call this place home.

Lowell Observatory is committed to providing access, and reasonable accommodation in its services, programs, activities, education, and employment for individuals with disabilities. The non-smoking campus is at an elevation of 7,200ft/2200m, and the LDT is 40 miles south of Flagstaff at an elevation of 7,800 ft/2370m. If you need a reasonable accommodation for any part of the application and hiring process, please notify the Carlson Beck consultant or the Human Resources office for assistance.

## HOW TO APPLY / CONTACT INFORMATION

To initiate consideration for this opportunity, **please submit a resume and cover letter**, speaking to your qualifications as per this Position Specification, to the Carlson Beck representatives below as soon as possible. For additional information regarding this opportunity, please contact:

**Sally Carlson**, *Managing Partner*  
415.203.5259 mobile; [sally@carlsonbeck.com](mailto:sally@carlsonbeck.com)

**Heidi Holzhauser**, *Partner*  
707.963.1250 direct; [heidi@carlsonbeck.com](mailto:heidi@carlsonbeck.com)