



INSTITUTE OF THE AMERICAS®

La Jolla, California

PRESIDENT

The Organization

Founded in 1983, the Institute of the Americas (IOA) is an independent, non-profit, inter-American institution that promotes investment in, and development of, needed physical and institutional infrastructure across the hemisphere. Its mission is conveyed in the statement below:

We build bridges across the Americas — linking business leaders, policymakers, journalists, teachers, and students to advance STEM education, share ideas, and facilitate opportunities. We help understand and catalyze innovation in core sectors, including: energy & sustainability, life sciences & biotech, and the digital economy as it pertains to these core, productive activities.

The Institute of the Americas achieves its objectives through various means and has a number of diverse programs that emphasize innovation and technological advances as the key to building 21st century economies in the Americas. Among them are: public conferences featuring public officials and private sector executives; small invitation-only executive roundtables that bring key policy and decision makers together; educational seminars for government officials; cooperative programs with other institutions focused on Latin America; convening steering groups from the private sector that provide advice and support to the Institute; acting as a clearinghouse and venue for personal networking for interested parties to make contacts and to disseminate information; special events that provide opportunities for communication and interaction among industrial and government sectors dealing with the Western Hemisphere; and publishing articles and reviews of interest to its constituents.

The Institute of the Americas seeks consistently to be an independent, neutral entity that provides non-confrontational forums in which public and private sector representatives can meet and share ideas and concerns that promote economic reform, strengthen infrastructure, and encourage innovation in key areas.

The Institute's longstanding, robust energy program is well established and is expected to continue to have a significant influence on both sustaining and diversifying energy production and delivery in the Americas. STEM, an existing program, continues to expand its scope and impact. Other areas of developmental interest include life sciences and biotech, with early

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initiatives in these fields currently being investigated and tested to determine their viability as new directions in which the Institute may leverage its experience, presence and role as a neutral convener to address key infrastructure issues in the Western Hemisphere. Notwithstanding a private industry orientation, the ultimate goal of the Institute is to increase the democratization of the Americas through sustainable development, market-oriented economic reforms, and the championing of effective transparent governmental institutions that will further free trade and economic integration.

In addition to its direct activities, the Institute also collaborates with other organizations such as the World Bank, the Inter-American Development Bank, and the Organization of American States; various chambers of commerce and similar industry-promotion institutions throughout the Americas; a number of universities, research institutes, and NGOs; and government agencies such as the U.S. Department of Commerce, the U.S. Department of State, and the Office of the U.S. Trade Representative.

The Institute is a stand-alone not-for-profit organization with its own Board of Directors and funding, and is located on the University of California San Diego (UCSD) campus in a complex of office and program facilities shared with two UCSD academic centers, The School of Global Policy and Strategy (GPS) and its related organization, The Center for U.S.-Mexico Studies.

During its early years, the Institute of the Americas reflected its academic relationships and understanding of Western Hemisphere issues. In 1990, Ambassador Paul Boeker, who had served in Bolivia, Jordan, and the United Nations, was named President of the Institute. During his twelve-year tenure, he was instrumental in strengthening and growing the organization by increasing corporate memberships, generating funds from grants, raising the public profile of the Institute, and generally positioning it as the preeminent convener of interested parties concerned with North American-Latin American issues and Latin America's economic progress. Ambassador Boeker retired in 2002 and was succeeded by Jeffrey Davidow, who had served previously as U.S. Ambassador to Venezuela and Mexico as well as Assistant Secretary of State for Latin America. Upon his retirement in 2013, Charles Shapiro, formerly Ambassador to Venezuela, was named to the role and was followed by Jamal Khokhar, former Canadian Ambassador to Brazil.

The Opportunity

As the global economy continues to evolve and the Americas look to the industries of the future, the Institute is ready to expand its agenda. IOA is poised to leverage its history, its extensive network of relationships, and its unique location in Southern California, where creativity and leading-edge advances in technology thrive, to support 21st century economies through innovation and sustainable development. To this end, the Institute has expanded its highly successful Energy Program to include a strong focus on renewables and has also created and is testing a Life Science & Biotech program. Areas of interest under consideration deal with furthering energy diversification efforts, building the STEM pipeline in Latin America, and strengthening biotech connections in the hemisphere as well as issues dealing with women's

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empowerment and enhancing infrastructure development in the Americas. These considerations do not constitute a defined path but instead indicate a direction in which the new President may wish to take the Institute. Indeed, areas of his or her expertise and associated relationships would be expected to inform the President's decisions about additional "pillars" on which to grow the Institute, facilitated by funds that will be dedicated to support the new executive's exploration and investigation of innovative and emerging program opportunities.

Additional information regarding these issues, as well as minimal candidate requirements, may be found in the "Route Map and President Profile," a document prepared by the Board of Directors in Spring 2019 and which, in a slightly redacted form, accompanies this profile.

Responsibilities

Reporting to the Board of Directors, the President will oversee all activities of the Institute of the Americas both to sustain its current prominence in Western Hemisphere issues and to strengthen the organization financially in order to anticipate and respond to emerging needs and opportunities in the field. Reporting directly to this person will be three executives responsible for the Energy and Sustainability Program, the STEM, Life Science and Biotech Program, and Finance. Specific duties will include the following:

- Ensuring that the Institute is properly funded and growing the endowment through philanthropic donations, membership fees, event income, foundation grants, and other means.
- Working closely with the Board of Directors to identify new opportunities for the Institute that will further its mission.
- Serving as the visible, public face of the organization by representing the Institute domestically and internationally and conducting forums, roundtables, and other public Institute events, as well as private dialogues between policy- and decision-makers from both the public and private sectors.
- Tending to and expanding the Institute's current network of member corporations, which includes major energy, telecommunications, biotech, financial, and infrastructure-related companies.
- Seeking ways in which the Institute can extend its influence through collaborations with sister institutions at UCSD, other entities within the University of California system, and multilateral development and financial organizations.
- Day-to-day management of the Institute by overseeing a current staff of 11 and administering a \$1.5 million budget.

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In short, the President will be responsible for the near-term success of the Institute as well as securing its ability to thrive and flourish in support of its mission during the coming years.

Candidate Qualities

Leadership

- One who leads by force of intellect, personal presence, understated confidence, excellent communication skills, and a compelling vision that inspires others.
- A forward-looking strategic thinker who has both a global grasp of Western Hemisphere issues and the practical knowledge necessary to implement and execute effective programs.
- A leader whose style is marked by independent thinking, carefully evaluated risk-taking, tenacity, and follow-through in order to achieve the Institute's objectives.
- A person whose professional accomplishments, personal bearing, and excellent communication skills engender a sense of trust, credibility, and respect among various constituencies
- An executive who empowers others, creating within them a sense of ownership and a drive to achieve desired results.

Experience

- A background in positions of impact and influence that have led to this person being viewed as a highly respected leader in Western Hemisphere matters.
- A track record as a transformer and builder who has guided organizations through change in response to evolving environments.
- An experience base that includes developing and working with networks of private sector executives, public officials, academics, and others who deal with North American and Latin American issues.
- Sufficient exposure to matters such as energy, biotech, life sciences, environment, technology, natural resources and professional service institutions to be conversant with infrastructure and integration issues.
- Background in roles that employ high level conceptual skills and interpersonal diplomacy to forge consensus and focus among individuals and organizations that represent disparate viewpoints.

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Skills and Knowledge

- A forward-thinking, open-minded, and proactive innovator who embraces prudent risk-taking and challenges the status quo while nonetheless respecting an organization's history and values.
- An executive with a marketing orientation who promotes public communications, is skilled at raising funds, and seeks and acts upon new opportunities.
- Able to identify unique expansion opportunities, to develop strategic plans in order to take advantage of them, to generate funds for their development, and to implement those ideas through new programs.
- A networker with, or who can gain access to, key international/Inter-American decision makers at the highest levels.
- Strong public speaking and writing skills, including communicating concepts and ideas effectively and persuasively to a wide range of constituents.
- The personal diplomacy and multicultural understanding necessary to operate successfully with a broad variety of individuals from myriad backgrounds and cultures.
- Strong business sense, financial acumen, and skilled in directing the development and implementation of strategic plans, budgets, and administrative policies and procedures.
- Fluent in English and, at minimum, conversant in Spanish.

Personal Attributes

- An individual with unquestionable personal ethics and integrity who deals with others in a straightforward manner and is comfortable with an open and transparent work environment.
- An energetic, entrepreneurial individual who is energized by challenges, unafraid to question the status quo and to stretch beyond his or her comfort zone, and eager to seize upon opportunities and to make things happen.
- A "natural networker" with well-developed political savvy who interacts successfully with and among people of power and influence.
- A visionary person who will "look over the horizon" and embrace prudent risk taking in order to create new initiatives and innovate compelling programs for the Institute.

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- One who is mission driven and will be focused on the success and advancement of the Institute and its objectives rather than on personal aggrandizement.

Other Considerations

<u>Compensation:</u>	Commensurate with experience and skill set.
<u>Language Requirements:</u>	Fluent in English and conversant in Spanish; fluency or high competency in Portuguese a plus.
<u>Travel:</u>	Heavy, with frequent trips to Latin America.
<u>Education:</u>	Bachelor's degree required; advanced degree strongly preferred.
<u>Location:</u>	La Jolla, California
<u>Website:</u>	www.iamericas.org
<u>Candidates May Now Be:</u>	<p>A senior executive in the for-profit world whose professional life experiences have given him or her the leadership, management, communication, and marketing skill sets to meet the entrepreneurial demands of this position.</p> <p>An experienced professional in a non-governmental organization or a multi-national economic development agency whose experience base includes conceiving and building high impact programs relevant to the mission of the Institute.</p> <p>A member of the diplomatic corps with experience dealing with North American/Latin American issues who has shown expertise in developing creative solutions to critical issues and needs.</p>

BRIGHAM HILL
CONSULTANCY

INSTITUTE OF THE AMERICAS
President

For more information, contact:

**L. Lincoln Eldredge
Dianne V. Puls
Brigham Hill Consultancy
214-871-8700
www.brighamhill.com
puls@brighamhill.com**

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ROUTE MAP AND PRESIDENT PROFILE

STRATEGIC MIDTERM OPPORTUNITIES FOR THE INSTITUTE OF THE AMERICAS

1) DIVERSIFICATION OF ENERGY PROGRAM

Energy will continue to be a major focus of the work of the Institute. However, new developments in renewable sources, new grid architecture, energy storage (related to lithium batteries), more sustainable approaches to transportation being developed (in Michigan and the Silicon Valley, by Tesla and other world class vehicle manufacturers), and even the U.S. Navy's interest in energy will allow us to broaden our agenda. To this end, we may attract Latin American and U.S. fellows interested in R&D on these topics, representatives from companies, as well as policy makers from across the United States and Latin America.

2) HELPING TO BUILD THE STEM PIPELINE IN LATIN AMERICA

The United States and the Institute are well situated to assist Latin American companies in identifying the specific skills needed in emerging technical and engineering careers, in particular for energy related companies, but also in related areas of software, IT, and cyber security. The Institute, through its relationships across Latin America and its embeddedness in one of the most dynamic innovation economies in the United States, San Diego, California, should be able to develop a number of connections and programs that equip Latin Americans to accelerate STEM talent development. After our own experience in the subject our focus should be on training the trainers rather than individual young students.

3) BUILDING BIOTECH CONNECTIONS ACROSS LATIN AMERICA

The life sciences and biotech, particularly in agriculture and health related fields are emerging forces across Latin America. Identifying and accessing potential partners within the United States for Latin American companies, as well as in Latin America for mature U.S. companies, is a promising area of development. In this realm, in-country sponsors of Fellows who might spend anywhere from a month to three months at The Institute learning about the policy and ecosystem dynamics enabling the robust biotech industry clusters in California, could be a very promising new development. To the benefit of the IOA there are no Foundations knowingly acting as LATAM conveners on the subject.

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4) WOMEN'S EMPOWERMENT

Latin America is a platform for a number of emerging women leaders with global presence. There are also a number of celebrity women who are eager to connect with their counterparts in business, the arts, and politics within the United States. Because of the unique connections having the Institute's Board and staff organize an annual event or ongoing fellowship focused on women in leadership across the Americas could be a new opportunity.

5) INFRASTRUCTURE ISSUES SHAPING THE AMERICAS

Building on the strong work at the border on transportation infrastructure, security, and trade issues, the Institute has the opportunity to incorporate this very rich agenda and cadre of civic leaders into its ongoing priorities. The SENTRI Lane, CBX, and water and pollution issues are all major topics being addressed within the San Diego/Tijuana region with relevance to border regions across America as well as in Latin America.

6) NEW PROGRAMS INCORPORATED INTO IOA'S BUDGET

The new President will develop the programs above and suggest others on an opportunistic fashion (based on suggestions from donors & JV's) when they are funded with an equivalent to at least "two times all-in cost for at least two years".

VALUE ADDED QUALIFYING ELEMENTS OF THE IDEAL NEW PRESIDENT OF THE INSTITUTE OF THE AMERICAS

This Profile will act as a guiding pillar for the Search Committee's work. To help streamline the search effort, we have brainstormed some of the essential qualifying elements for our next President. Ideal characteristics of the successful candidate would include:

- a) an active professional life (ideally not retired).
- b) a proven extensive professional network in at least three of the following LATAM environments: Mexico, Argentina, Colombia, Peru, Chile, and Ecuador. Brazil, despite its great potential, has proven to be too big for the IOA to engage.
- c) an array of experience in fundraising given that most IOA revenue will come from direct fundraising and new donor recruitment—not from attendance fees at the Institute's events.

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d) a proven track record of conducting business in the US and/or multilateral institutions (e.g., World Bank, Inter-American Development Bank, Organization of American States, etc.).

e) flexibility regarding full time vs. part time or residential vs. non-residential employment terms, which the IOA would gladly consider and offer.

f) a willingness to embrace the goals and objectives of this Route Map and to exploring, investigating, and engaging with the Board in developing and executing them on behalf of the Institute. In addition, all candidates will be invited to impart their vision for new programs and ideas that they may like to introduce in the future that are not only financially sustainable but also of great interest for the region.