



**OPPORTUNITY** MARKETING PIECE

# **CHIEF SUPPLY CHAIN OFFICER**

LOCATION | **Rohnert Park, California**

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TRADITIONALEMEDITINALS.COM

## ABOUT **TRADITIONAL MEDICINALS**

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Traditional Medicinals® (TM) is a growing 43-year-old herbal wellness company based in Sebastopol, CA. TM manufactures 57 varieties of herbal and medicinal teas in its solar powered Sebastopol, CA facility. Traditional Medicinals is proud to be the number one medicinal, organic, and fair trade herbal tea company in North America. In 1974, TM pioneered the herbal medicinal tea category, and over the years it has grown to become the 4th largest bagged tea company in the US. Its products are distributed nationally across 70,000 retail outlets in North America in all channels from health and natural foods stores, to every major grocery chain, to mass market retailers, and drug stores.

Any hot tea can comfort people, but the right blend will be comforting and beneficial at the same time. TM doesn't just make formulas because they sound good: they are passionate about passing along the centuries-old wisdom of how to use plants for wellness.

### **Here's what makes them better:**

**High Quality Herbs:** TM is committed to using pharmacopoeial grade herbs – that's a marker of very high quality that almost no other tea company claims. They also try to source their herbs from their native habitats because herbs that are "at home" tend to have the right balance of active compounds.

**Herbalists' Formulations:** TM's trained herbalists are stewards of traditional herbal knowledge, basing their products on herbal combinations that have been helping people for centuries.

**Quality Control:** TM's herbs go through a minimum of nine rounds of rigorous testing before they make it to a tea bag, from microscopists and lab analysts who test each herb's identity, strength and purity to the cupping team who ensures the tea tastes right.



# QUALITY DIFFERENCE

## TM IS A BIT OBSESSIVE ABOUT QUALITY.

### IDENTITY TESTING: THE SCIENTIFIC NAME AND BUSINESS

TM's first job is to make sure that the herbs they are using are what they claim to be. They call it identity testing. People might think that would be pretty obvious – doesn't chamomile always look like chamomile? – but there are a lot of herbal dop-pelgangers out there. And even if it actually is chamomile, not all chamomile is created equal. TM is looking for specific characteristics of each batch of herbs that determine quality. One of the first steps their herbalists go through, after examining a new batch, is to put a sample from each shipment under the microscope. There they see each individual flourish, whirl, and spiral that indicates the herb's identity.

### PURITY OF HERB

Now that TM knows the plant's identity, they have to test the plant's true character. They only want the pure herb in the tea bag, not some of the nasties like wayward plant parts, leftover sand or dirt. They also look at water content to make sure the herb has been dried properly, and check for microbes, heavy metals, and, if non-organic, pesticide residues.

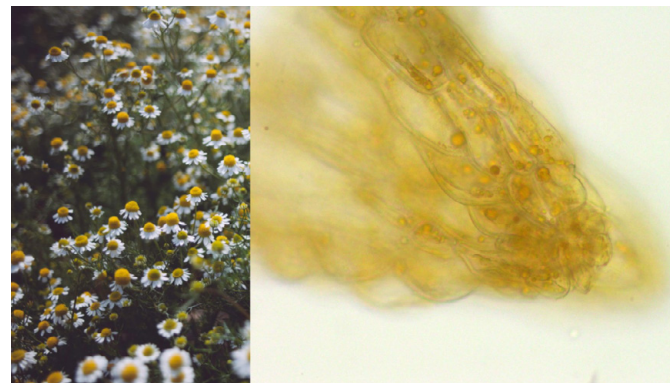
### TESTS OF STRENGTH

It takes a lot of testing to make sure that pharmacopoeial grade standards are met. TM's in-house and suppliers' labs conduct testing to be absolutely, completely sure that they are getting the systems-invigorating, body-balancing quality they need.

For example, herbs like marshmallow and slippery elm rely on texture to perform their jobs. These are mucilaginous, which means they are high in mucilage, a slimy (in a good way) substance that produces a slippery, coating effect. On the other hand, many herbs, like peppermint, rely on essential oil content. TM uses a wide range of tests to make sure their herbs are strong enough to join the proud ranks of pharmacopoeial grade.

### CUPPING

Taste, texture, and aroma are a very important, but sometimes overlooked, part of herbal remedies. The cupping team, led by TM's professional blendmaster, tastes and smells a brewed cup and evaluates its properties. This sensory evaluation helps them make sure that each herbal blend has the right taste and aroma.





# TM'S CULTURE

## CULTIVATING THE LOVE OF BOTANICAL WELLNESS

TM loves plants and wellness. They are proud to be the number one medicinal, organic, and fair trade herbal tea company in North America with over 60 varieties of herbal, medicinal teas. They love to talk about plants, share wellness ideas, and spread medicinal herb knowledge. They don't just talk the talk - TM thinks it's important to walk the talk of the core values they stand for: Quality, Innovation, Collaboration, Humility, Respect and Sustainability.

## CONTRIBUTING TO A LARGER PURPOSE

TM believes in a triple bottom line - focusing on people, planet, & profit. The Company purchases 107 different herbs from 37 different countries on six continents. Annually, TM invests over \$1MM in herbal growing communities. Today, over 1,000 children attend a TM school in India where the Company has built the building and supplied the teachers, daily hot meals, uniforms, and a bike to get there. For all of their sustainability and ethical business practices, TM was recognized as one of the top 10% of all Benefit (B) Corporations in the world.

## MAKING AN IMMEDIATE AND LASTING IMPACT

Traditional Medicinals is an independent, intensely purpose-driven company with a planning horizon extending beyond the next generation. For 43 years the Company has been a pioneer in an emerging social business model while achieving commercial success as the 4th largest bagged tea company in the US. Their size and accessible leadership enable their employees to make significant contributions.

## WORKING IN BEAUTIFUL SONOMA COUNTY, CALIFORNIA

TM has a solar-powered manufacturing and warehousing operation based in Sebastopol, CA, which is 65 miles north of San Francisco, and a beautiful new office in Rohnert Park, CA which lies 45 miles north of San Francisco in the center of scenic Sonoma County.



"I love that everyone is supportive of each other, and that I get to be myself and grow at Traditional Medicinals. Everyone is like a family." — Jessica Torres



"I love working for TM and being a part of a company that brings whole-body wellness and symptom relief to millions of families every year." — Mike Beehler



"I love the company culture at Traditional Medicinals. As an immigrant, the sense of belonging is important. I feel like part of a family." — Au Nguyen



# BLAIR KELLISON



CEO

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Blair is TM's first non-founder CEO, which means he's had some big shoes to fill. He took the reins from co-founder Drake Sadler in 2008, feeling called to apply his business talents to products he deeply believes in.

A former CPA with Ernst & Young, Blair received his MBA from The University of Chicago in marketing and finance, and worked as a brand manager at Nestle Foods. In 1995, he took a 70% pay cut and a huge risk that would become the best decision of his career—leave his business development position for a mission driven, all natural food company called Fantastic Foods. That bold move started him on the path of working in what he most believes in: mission driven, health and wellness companies.

Blair has a history of strong leadership in companies whose mission is to bring health and wellness to their lives. He was CEO of Alternative Medicine, a multi-media publishing company. During his five-year tenure he transformed the company from an unprofitable fledgling organization, into a high growth and profitable enterprise. Before joining Traditional Medicinals, he co-founded and helmed Natural Snacks.

Blair had been drinking Traditional Medicinal teas for many years, but it was not until a visit to the company that he realized the extent of TM's commitment to their employees, to their farmers and collectors around the world and to instituting sustainability and social responsibility into every aspect of its business—from field to manufacturing.

Citing TM's reinvention of the standard business model as inspiration, Blair is excited to inherit nearly 40 years of commitment to product quality and consumer trust, and looks forward to continuing the company's fulfillment of its mission: connecting people to the power of plants.



## GARY CUNNINGHAM



*Vice President, Human Resources*

L<sup>3</sup>G<sup>2</sup>T is how he shortens his six personal core value - Loving, Learning, Laughing, Giving, Growing, & Teaching. Gary credits those same core values and his mom for guiding him throughout his life. Born in Houston, TX and raised throughout the deep South, Gary learned from his family of mostly strong, single-mothers the importance of hard work, a healthy sense of humor, and the satisfaction derived from putting other's first. Although he began his career conducting cancer research as a Howard Hughes Medical Institute research fellow, it wasn't long before his passion for helping others would lead him to working with people and organizations.

As a values-driven leader, Gary believes that happiness is about being your best self, being interested vs. interesting, and finding new ways to challenge yourself while saying 'yes' to life's many adventures." He's brought that same passion and energy to his career from the start, positively impacting complex businesses undergoing growth and transformation in the tech, manufacturing and CPG sectors—both domestically and internationally. Always emphasizing the value of putting people first, building a great culture, relentlessly managing talent, creating high performance teams, and authentic leaders. Gary has over two decades of experience leading enterprise transformations, helping businesses scale, and supporting people at companies like Kellogg Company, Ajilon, AIDS Foundation of Chicago, and most recently OC Oerlikon.

Gary earned his bachelor's degree in Biomedical Science from Texas A&M University, and he graduated magna cum laude with his master's degree in Management from North Park University. In 2013, he completed his executive education in General Management (GMP14) at Harvard Business School where he is an active alumnus. Gary holds certifications in DISC, various Lominger frameworks as well as mediation & negotiation from Harvard Law School's Negotiation Institute. Gary is also a certified Senior Professional in Human Resources (SPHR) and a trained executive coach.

Excited to have made the leap to a purpose -led, social business, Gary is a strong proponent of people aligning their careers to best match their core values. It's exactly what led him to Traditional Medicinals. Gary moved from Chicago, IL in January of 2018 after many years, and now lives in San Francisco, where he spends his free time practicing TM, traveling with his partner, hiking, weight training, zip-lining, and enjoying a laugh over a glass of pinot with close friends.

## POSITION OVERVIEW

**CHIEF SUPPLY  
CHAIN OFFICER**

TRADITIONAL MEDICINALS

The Company is currently seeking qualified candidates for a Chief Supply Chain Officer to join their Senior executive leadership team. The Company is a mission driven, values led, social business, including a 501 C3 foundation solely focused on their Supply Chain. Reporting to the Chief Executive Officer, the Chief Supply Chain Officer is responsible for leading, managing, transforming and developing the enterprise-wide Supply Chain function. This position oversees the Company's total annual spend across one owned and operated manufacturing facility, eight co-packers and two administrative offices. The Company sells to 70,000 retailers throughout North America, producing more than \$110M in annual sales with a 10 year compounded annual growth rate of 15%. Long-term consumer trends toward health, wellness and self-care will support this growth rate for another two decades. Currently, the Company maintains a worldwide Supply Chain and procures 120 agricultural inputs from 275 locations across 40 countries on six continents. The Company is making this strategic hire as part of its preparation for the greatest expansion in its history.

This position directly oversees all purchasing activities (agricultural inputs, packaging and all other manufacturing inputs), logistics and planning functions. Building a co-pack Supply Chain team will be critical to the success of the role. This position provides strategic direction across procurement, planning, value analysis, logistics and inventory and Supply Chain informatics and analytics. The role focuses on achieving key Company objectives such as ensuring adequate supply to meet growth, enhancing customer outcomes, quality and the financial sustainability of the enterprise. As such, the Chief Supply Chain Officer will be tasked with creating a strategy that will transform the function towards new and sustainable efficiencies and suc-

cess, including optimizing sourcing, driving cost and control initiatives, establishing a culture of efficiency and effectiveness and aligning people, process and technology. This role requires a proven, transformative and adaptable leader with a strong track record of leading and transforming large, complex, consumer packaged goods Supply Chain functions at the enterprise-level, driving innovation and executing against strategic objectives.

**PRIMARY RESPONSIBILITIES****STRATEGIC SUPPLY CHAIN MANAGEMENT**

- Create, communicate and execute against a strategy for enterprise-wide Supply Chain to achieve key Company strategic objectives across procurement, sourcing, value analysis, logistics and inventory and informatics and analytics.
- Lead, manage, develop and set direction for the enterprise-wide Supply Chain function.
- Oversee a portfolio of improvement initiatives across Supply Chain pertaining to, but not limited to, strategic growth, cost reduction and alignment of people, process and technology.
- Build and maintain strong relationships with strategic vendors and with key stakeholders across the Company.
- Ensure operational and inventory controls exist to protect the Company's assets.
- Minimize organizational risk ensuring consumer well-being, customer delight, product quality and the financial sustainability of the Company.
- Publish relevant supply chain and financial reports to internal and external stakeholders as needed to create transparency, alignment and data-driven decisions.

**OPERATIONS**

- Participate in key decisions as a member of the Senior executive management team.
- Maintain in-depth relations with all members of the management team.
- Oversee the Company’s Supply Chain transaction processing systems.
- Build a high-performing co-pack Supply Chain function, foster team cohesiveness and establish a welcoming culture of efficiency and effectiveness.
- Develop and monitor key performance metrics for the Company’s Supply Chain to support the Company’s strategy.
- Attract, retain and develop staff to ensure continuous capability enhancements across the Company’s Supply Chain.

**RISK MANAGEMENT**

- Design, implement and monitor an enterprise risk management process for the Company’s Supply Chain, including the identification of the Company’s principal risks.
- Monitor all open contracts, future obligations and legal issues involving the Company’s Supply Chain.
- Procure and manage appropriate insurance coverage in collaboration with the Company’s Controller as needed.
- Ensure that record keeping meets the requirements of auditors and government agencies.
- Report risk issues to the CFO and CEO as needed.
- Implement recommendations of external auditors appropriately and timely implement.

**INVENTORY MANAGEMENT**

- Utilize forward-looking models and activity-based analyses to provide financial insight into the Company’s Supply Chain plans and operating budgets.
- Manage & communicate Supply Chain decisions impacting the Company’s cash flow planning process and funds availability.
- Manage the overall strategic direction of enterprise-wide Inventory Management processes and systems which includes: forecasting; budget planning and execution; product lifecycle management; and shipping forecasts.

- Develop inventory planning and control strategy to ensure effective Supply Chain and Logistics objectives are achieved.
- Responsible for cultivating strong supplier relationships, providing excellent customer service to internal and external customers and consistently negotiating cost-effective contracts minimizing contract risk.
- Develop, manage and own the vendor compliance program including inspection & accountability.
- Responsible for the overall purchasing and replenishment of finished goods required to satisfy customer demand while maintaining efficient inventory levels.

**SKILLS & EXPERIENCE**

- At least 15 years of experience in progressively more sophisticated Supply Chain leadership roles.
- Minimum 5+ years of experience as a Chief Supply Chain Officer in a fast-growing, mid- to large-sized (\$300 million+) company.
- Experience in Supply Chain planning, cost analysis, business forecasting and inventory optimizations in consumer packaged goods (preferably food & beverage) industry.
- Deep experience in planning. The ideal candidate should have their strongest skill sets in planning.
- Experience developing executive relationships; managing multiple simultaneously complex projects and developing key strategies around business objectives.
- Manage enterprise resource planning, material management systems and implementation.
- Experienced in managing the performance of third-party suppliers and logistics service providers.
- Deep understanding of Supply Chain functions in large consumer packaged goods, including, but not limited to, leading practices across procurement, sourcing, value analysis and materials management as well as ability to transform the Supply Chain function and optimize sourcing relationships to achieve improved outcomes and organizational cost effectiveness.
- Ability to craft and execute a strategy to transform Supply Chain functions and realign process, people and technology.



- Ability to provide leadership, strategic direction, oversight and management for a large and complex Supply Chain function, working at enterprise-level.
- Demonstrated ability in building high performing teams and in coaching and developing staff.
- Excellent analytical, financial modeling, reasoning, problem-solving skills and supplier network management skills.
- Demonstrated leadership ability, confidence and executive presence – ability to motivate and influence staff and key stakeholders.
- Outstanding knowledge and understanding GAAP, MS Office and MS Dynamics AX.
- Significant experience negotiating and collaborating with international suppliers, large retail customers (i.e. Wal-Mart, Target, Whole Foods, etc.) and distributors (i.e. UNFI, etc.), as well as various indirect enterprise suppliers.

#### **Personal Characteristics**

- Strategic and creative thinker, yet able to execute and get results. A thorough planner.
- Curious; continuous quest for knowledge, improvement or the next peak.
- Practical, yet able to communicate vision and big perspective.
- Entrepreneurial, dynamic approach, yet low need for ego.
- Enjoys building and leading teams as well as team participation.
- Comfort working in a fast-paced, open culture.
- Confident and timely communicator; transparent and tactful, yet direct.
- Accountable for actions of self and others.
- Displays uncompromising work ethic and willingness to roll up sleeves.
- Flexible, optimistic, “can do” attitude.
- Honest and ethical.



## ABOUT ROHNERT PARK AND SONOMA VALLEY, CA

### ROHNERT PARK AND SONOMA VALLEY, CA

Located in central Sonoma County and laid out in the 1950s, family-friendly Rohnert Park was one of the first planned communities nationwide.

Kid-oriented activities abound. Take a spin in competition-level electric karts at Driven Raceway, which also offers a mini golf course, mini bowling alley, video games, and the Hot Rod Café. Roll on wheels at Cal Skate Roller Blading and Skating Center. Enjoy bumper boats, miniature golf, batting cages, and other fun activities at Scandia Family Fun Center. Bowl for a strike on one of the 50 state-of-the-art lanes at Double Decker Lanes, which includes a snack bar, video arcade with pool tables, a bowling pro shop, and a full-service sports bar. For an arts break, the Spreckels Performings Arts Center provides the finest performing arts programming from around the world. And the 128-acre Crane Creek Regional Park offers hiking (including wheelchair-accessible trails), biking, and horseback riding; an 18-hole disc golf course; picnic

tables; and outstanding bird watching opportunities.

The Donald and Maureen Green Music Center, located on the scenic campus of Sonoma State University, is a world-class performing arts complex with multiple performance venues, a music education wing, and more. The jewel in the Green Music Center crown is the acoustically superb 1,400-seat Joan and Sanford I. Weill Hall concert venue. Modeled after Seiji Ozawa Hall at Tanglewood, Weill Hall includes a back wall that can be fully opened onto a landscaped and terraced lawn, to expand the audience capacity for summer concerts.

The Sonoma Valley is not only a wonderful place to visit, but also a great place to live and work. Whether buying or renting, Sonoma Valley offers housing options ranging from apartments and condominiums to single-family homes. Sonoma Valley can be found in the southeastern corner of Sonoma County and is perhaps most well known for being “Wine Country”. There are more than 425 wineries in this



area, ranging from small and rustic to elaborate castles. Some have quaint picnic grounds while others are home to gourmet reservation-only restaurants. One vineyard – Rodney Strong – even hosts an annual concert series. The area also hosts an annual Taste of Sonoma festival where visitors and residents can taste all of the wonderful wine – and gourmet food – the area has to offer.

The Sonoma Valley Unified School District (SVUSD) oversees five neighborhood elementary schools, two charter schools, two middle schools, a comprehensive high school, and an alternative education high school. The Kenwood School District oversees one elementary school. Several private schools serve children in Sonoma Valley, including St. Francis Solano School, The Presentation School, Sonoma Valley Academy, SoloQuest, Sonoma Academy, and Hanna Boys Center.

Local residents are served by two community colleges, Napa Valley College and Santa Rosa Junior College, considered one of the "jewels" of the California Community College System. SRJC offers a strong general education program for students planning to transfer to four-year colleges and universities, along with more than 175 career skills certificate programs that prepare students for the workforce, including a

highly-respected culinary arts program.

Sonoma State University, about a half hour away, offers degrees in 45 majors at the bachelor's level and 15 at the master's level, through school of Arts and Humanities, Business, Education, Social Sciences and Science and Technology. The SSU School of Business & Economics offers undergraduate business and MBA programs as well as a Wine Business Institute, and actively partners with other regional organizations to grow the local economy.

Sonoma is very proud of its community hospital, recently named among the 15 safest hospitals in the country by Consumer Reports. Sonoma Valley Hospital provides a wide range of healthcare services including a brand new, state-of-the-art 24-hour emergency room and surgery center, along with a birthing center, rehabilitation center, occupational health, the Carolyn J. Stone Center for Women's Health and Wellness, and the new Compass Health Assessment Center.

Over the years, Sonoma Valley has attracted numerous health care and fitness professionals in traditional and alternative fields, giving residents an abundance of treatment options. Excellent dental, eye, skin, and hearing care are also widely available.

# ROHNERT PARK AND SONOMA VALLEY, CA LINKS

## GENERAL AREA LINKS

**Rohnert Park**  
rpcity.org

**Rohnert Park Chamber of Commerce**  
rohnertparkchamber.org

**Sonoma County**  
sonomacounty.ca.gov

**Sonoma County Connections**  
sonomacountyconnections.org

## SHOPPING

**Santa Rosa Plaza Shopping Mall**  
simon.com/mall/santa-rosa-plaza

**Petaluma Village Premium Outlets**  
premiumoutlets.com/outlet/petaluma-village

## EDUCATION

**Sonoma Valley Unified School District**  
sonomaschools.org

**Sonoma State University**  
sonoma.edu

**Napa Valley College**  
napavalley.edu

**Santa Rosa Junior College**  
santarosa.edu

## ARTS & ENTERTAINMENT

**Sonoma Valley**  
sonomavalley.com

**Visit Sonoma County**  
sonomacounty.com

**Driven Raceway**  
drivenraceway.com

**Sonoma County Regional Parks**  
parks.sonomacounty.ca.gov

**Green Music Center**  
gmc.sonoma.edu

## NEWS

**abc7 News**  
abc7news.com/place/rohnert-park

**Sonoma Index-Tribune**  
sonomanews.com

## REAL ESTATE

**Zillow - Rohnert Park, CA**  
zillow.com/rohnert-park-ca

**Zillow - Sonoma County, CA**  
zillow.com/sonoma-county-ca



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