



THE 360 GROUP
— EXPECT THE UNEXPECTED —

Santa Barbara Foundation

President & Chief Executive Officer

Position Description & Candidate Profile

President & Chief Executive Officer

Location

Santa Barbara, California

Reports to

Board of Trustees

Our Client

The Santa Barbara Foundation (SBF), one of the oldest and largest community foundations in the United States, was established in 1928 to enrich the lives of the people of Santa Barbara County through philanthropy and community involvement. As Santa Barbara County's largest private source of funding for nonprofit agencies and the backbone of a strong regional tradition of philanthropy, SBF mobilizes collective wisdom and philanthropic capital to build empathetic, inclusive and resilient communities. Now in the second year of implementation of a bold strategic plan, SBF invests in programs that support the County's most vulnerable populations by addressing basic human needs, and systems change for those individuals and families that are living "paycheck-to-paycheck" and are susceptible to becoming even more vulnerable with just one adverse life event.

Now celebrating nearly 100 years of philanthropy, The Santa Barbara Foundation, covering all of Santa Barbara County, reflects the broad-based generosity of the communities throughout the county. At its core, SBF connects people who care with causes that matter, promotes effective giving to meet community needs, supports a vibrant nonprofit sector and building community capital through leverage and partnerships.

The Santa Barbara Foundation has charitable assets of more than \$500 million. SBF has a board of 16 and a talented staff of nearly 30, representing the various regions of the County and who serve as its ambassadors. This strong base presents the right candidate with an exciting opportunity to further an exciting new course in promoting community philanthropy throughout Santa Barbara County, as SBF combines the traditional functions of a community foundation with roles as an advocate and fundraiser for specific community issues.

Learn more about SBF at <http://www.sbfoundation.org>.

The Opportunity in Context

Santa Barbara County has a fascinating history, which is still alive today – and sets, in part, the context in which SBF lives. With a population of 450,000, the County is comprised of distinct regions. From Metro Santa Barbara, with a high student population, growing technology industry and rich cultural assets, to Lompoc, Santa Maria and Guadalupe, with

a rich agricultural tradition, still to the Santa Ynez Valley, with a strong wine producing industry, Santa Barbara has a host of community issues which a strong strain of philanthropy can address. The County has great wealth, and also significant poverty and livability issues. SBF has committed, through its two-year-old strategic plan, to tackle these issues.

The region is home to nationally renowned cultural and intellectual assets, with world-class museums, performing companies, institutions of higher education, and a rich infrastructure of nonprofit organizations. Like much of the nation, the region is changing: it is becoming more diverse in many ways, and there is increasing economic activity with technology and other industries setting up and taking hold; meanwhile, affordable housing and transportation have emerged as pressing issues. SBF sits at the nexus of these trends, and is well positioned to frame and advance the course of the community's future. With a focus on working families, those more vulnerable, strengthening the nonprofit sector, and leveraging partnerships – as well as continuing to support community vitality through the Towbes Fund for Arts and Culture – Santa Barbara County is an exciting place for community philanthropy and leadership.

Position Responsibilities

The Santa Barbara Foundation seeks a professionally accomplished leader to serve as its next President and Chief Executive Officer. The new President & CEO will provide dynamic and forward-thinking leadership to promote the fulfillment of SBF's vision and mission, implement the Board-supported strategic plan, and steward the role of SBF as a key convener in Santa Barbara County. The President & CEO will serve as the key spokesperson and face of SBF to its grantees, donors, and civic and community leaders. The President & CEO will support Board and staff to be visible in philanthropic activities throughout the communities in Santa Barbara County. The new President & CEO will have a broad-based mix of experiences to promote philanthropy throughout the region, attracting gifts to increase the size and impact of the Foundation, leading grantmaking and evaluation, developing and deepening lasting partnerships, supporting the County's nonprofit sector, and continuing to advance the Foundation's role in community leadership and advocacy. The President & CEO will further position the organization to listen to and lift the voices of a broad cross-section of Santa Barbara County residents, engaging them in developing solutions for their communities.

Specifically, the President & CEO's responsibilities will include:

- Getting to know the communities of Santa Barbara County intimately – the people, places and character of the various distinct communities within the region
- Serving as a visible leader in philanthropy throughout the county, advancing SBF's overall mission and specific agendas in public forums, and through building key partnerships, alliances and coalitions with other leaders in business, government,

- academia, the nonprofit sector and other arenas throughout the region
- Strengthening existing and cultivating new relationships with SBF's key community stakeholders, including other private funders, public-sector leaders, nonprofit leaders, private sector partners and other opinion and thought leaders
- Working with the Board of Trustees and staff to use SBF's tools – grants, working with donors through advised funds, programmatic initiatives, and advocacy – to their highest and best use, empowering the SBF team to enhance and deepen a body of work that responds to Santa Barbara County's needs, and shapes its future
- Leading by example, championing SBF's values of innovation, inclusivity and accountability; ensuring that SBF's management sustains a strong performance-based culture through hiring, training, motivating and retaining talented staff as well as through internal controls, budgeting and finance; in effect, facilitating and supporting highly effective teams in a “best places to work” environment
- Working closely with the Board of Trustees to provide leadership, information, and support that enhance the governance of SBF
- Guiding implementation of SBF's new strategic plan, translating it to execution plans that engage the full SBF team in concerted effort; consistently assessing capacity and resources to ensure that the Foundation is well positioned to accomplish its objectives
- Orienting SBF to provide effective and clear communications, ensuring that the broader community is clear on what SBF is and what it does – to solidify SBF's brand identity in the community
- Using an array of approaches – including convening community conversations – to assess and evaluate needs; using those assessments to develop and prioritize issues and measure impact
- Publicly highlighting opportunities in philanthropy and issues that affect Santa Barbara County in SBF's areas of strategic focus, inspiring donors and genuinely collaborating with other funders to leverage additional resources for issues facing vulnerable populations
- Increasing the assets and endowment to support the implementation of the strategic plan for the benefit of the community and the sustainability of the Foundation using creative, contemporary vehicles and continuing to invest in a mission-critical development function
- Integrating technology into SBF's strategy and execution models, to support

efficiency and excellence in key areas, including ensuring high quality consistent service to current and potential donors

- Deepen the Foundation's relationships with the professional advisor community, to ensure that the high net worth population is aware of the Foundation and its philanthropic services and impact, relative to other options available to donors
- With the Investment Committee, ensuring the effective stewardship of the Foundation's corpus and funds
- Overseeing the annual operating budget in a pragmatic, cost-effective fashion

Profile of the Successful Candidate

SBF seeks a proven leader who can easily engage with a wide variety of people – from donors and political leaders to nonprofit and community leaders – and everything in between. The successful candidate will truly enjoy getting to know a wide variety of Santa Barbara County residents and will take great pleasure in advocating on their behalf – in short, being a visible, approachable, relatable leader and active member of the community. SBF's next President & CEO will have strong people and process management, organizational, analytical, communication, consensus-building, and fundraising skills. The successful candidate could come from a variety of leadership backgrounds; though they will have experience in the non-profit sector (either as staff or a board member), they may also come from other fields, such as work in the private, public, or academic sectors.

More specifically, SBF seeks a seasoned professional who has:

- An energetic, entrepreneurial nature that combines intellectual curiosity with analytical skills and political savvy, and a strong interest in – and excitement about – the challenges and opportunities facing the communities within Santa Barbara County
- Significant leadership experience in the private, public, independent, or foundation sector
- Successful experience working in a highly visible environment
- A track record of fundraising accomplishments, with knowledge of philanthropic tools and vehicles
- An understanding of the distinct value proposition of community foundations, including a knowledge of how the power of working with community leaders and donors through their funds can build community and resident engagement and

- problem-solving
- Demonstrated successful experience in fundraising, program development and board development and management
- Demonstrated effective work in community relations and advocacy – influencing political leaders and convening key players
- Ability to foster a trusting work environment that results in efficient and effective organizational management and a healthy and positive workplace culture
- An affinity for intellectual leadership, as evidenced by a track record of forward, anticipatory thinking and the development of strategy and vision for the future, with a bias toward innovation that brings new ideas to fruition and implementation
- The ability to forge pragmatic, collaborative solutions in environments characterized by ambiguity and complexity
- A communicative and collaborative interpersonal approach, demonstrated through strong written and oral skills as well as strong listening skills
- An inclusive, consensus-building leadership style both in and out of the public spotlight that simultaneously inspires Board members, staff, clients, donors, and partners in the community
- Strong business and financial management acumen, a data-driven orientation in the deployment of financial resources and in making critical business decisions; a well-developed ability to distill legal, financial and business information to guide priorities
- Strong integrity and a commitment to professional excellence, combined with values that wear well over the long term
- A bachelor's degree

The selected candidate will also likely have:

- An advanced degree
- Exposure to the community foundation model and an appreciation for its potential to empower residents to advance community issues

Start Timeframe

We seek to have someone in place by early Fall 2020.

Compensation

This position offers a competitive salary, and excellent benefits. We actively welcome all candidates from a wide range of backgrounds who have the skills to lead this dynamic philanthropic institution – regardless of compensation history.

To Apply

All applications are held in strict confidence. Please submit your credentials and a letter of interest through our private applicant portal to The 360 Group at:

<https://the360group.us/portal/>

Applications should be directed to the attention of Vincent Robinson, Managing Partner or Maureen Capitolo, Principal. Applications will be reviewed on a rolling basis, though earlier applicants may receive priority consideration. To be considered, The 360 Group encourages all interested candidates to submit their applications promptly, via the confidential applicant portal linked above.

At The 360 Group, we know that a richly diverse mix of professionals makes organizations more effective. Using that principle as our “North Star,” we make diversity a hallmark of our firm, and all of our search engagements.

Learn more about The 360 Group at the360group.us.