



THE 360 GROUP
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Santa Barbara Foundation

Vice President, Development and Donor Relations

Position Description & Candidate Profile

Vice President, Development and Donor Relations

Location

Santa Barbara, CA

Reports to

President & CEO

Our Client

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. 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.

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 builds community capital through leverage and partnerships.

Santa Barbara Foundation has charitable assets of nearly \$500 million. SBF has a board of 16 and a talented staff of approximately 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.

In order for SBF to grow and pursue its invigorated mission, which is "to mobilize community wisdom and philanthropic capital to build empathetic, inclusive and resilient communities," and to meet some ambitious goals, the foundation will be making considerable investments in its own infrastructure and personnel. The

financial and cultural investment will require the acquisition and deployment of an expanded tool belt of strategies including impact investing, measurable social media strategies, greater countywide community engagement, and a willingness to take risks, fail, and learn.

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

Position Responsibilities

The Santa Barbara Foundation seeks an experienced leader and manager to serve as the Vice President, Development and Donor Relations. The Vice President, Development and Donor Relations will provide strategic leadership in all aspects of asset development, new partnerships, and leveraging the impact of donations from donors. This role will lead and develop an integrated development and marketing/communications strategy focused on cultivating new partnerships for co-investment in SBF's community impact work, driving new revenue opportunities, and continuing the stewardship and expansion of its donor base and endowment. With new leadership at SBF, this is a key moment for a skilled development professional to maximize and strengthen the internal capacity of a well-respected, impact-oriented organization.

Specifically, the Vice President, Development and Donor Services will:

Executive Leadership and Business Modeling

- Serve as a member of the executive leadership team, including the CEO and other department heads responsible for organizational policy development and planning
- Work with the Foundation CEO and Board on SBF's evolving business model, supporting strategic planning and implementation efforts, ensuring that all Foundation initiatives make economic sense and are consistent with the organization's resource development strategy
- Serve as primary liaison to the Board of Directors' development and donor relations committees and working groups; effectively communicate and present critical matters to the Board
- Lead data analysis and information sharing that offer fundraising insights to aid in decision-making, strategic direction, long-range planning and business modeling
- Collaborate with President, Finance and Program staff to pursue opportunities to develop additional resources among individuals, organizations, agencies and businesses through development and donor relations related activities
- With Finance and Administrative staff, develop new business and fee for service offerings

- Manage Development/Donor Relations and Communications teams

Resource Development

- Lead, plan, and implement SBF's development efforts to grow revenue in order to sustain and expand programmatic/community engagement efforts, and the Foundation's endowment
- Work closely with donors, fundholders and partners to help execute their charitable giving and introduce them to new opportunities to make an impact with their philanthropy
- Develop and manage relationships with current and new individual, family, foundations and corporate donors, which increasingly will be through partnerships as well as direct fundraising
- Oversee productive, effective relationships with donors to help their philanthropy to be as effective as possible
- With Donor Services staff, develop and maintain relationships with professional advisors (wealth advisors, CPAs, estate planners) to deepen their knowledge of SBF's services and encourage establishment of donor-advised and/or testamentary (e.g., bequests, CRTs, CLTs) funds by their clients
- With Donor Services staff, provide opportunities for donor education and strategic investments in community programs
- Support work on SBF's role as a charitable hub where information, knowledge, resources and influence come together to address complex issues for the greater good of Santa Barbara County
- Oversee annual appeals, special campaigns, donor stewardship events and activities
- Prepare and make persuasive presentations about philanthropy and SBF's role as a partner
- Regularly network within groups of corporate engagement professionals (convening them, as needed and to further initiate and develop relationships in this sector)

Donor Services

- Advise, cultivate and steward donors in developing and maintaining new funds or transferring gifts to the Foundation
- Understand gift and fund options available for donors and evaluate proposed gifts in adherence to state and federal laws, SBF policies and its ability to administer gifts appropriately
- Manage and maintain excellent records on fund agreements to ensure donor intent; administer funds accordingly
- Ensure excellent customer service

- Serve as subject matter expert for complex gifts and fund issues
- Oversee SBF's Professional Advisors Network; with resource development colleagues, develop and maintain relationships with professional advisors (wealth advisors, CPAs, estate planners) to deepen their knowledge of SBF's services and encourage establishment of donor-advised and/or testamentary (e.g., bequests, CRTs, CLTs) funds by their clients
- Oversee management of several large field-of-interest and committee advised grant processes
- Work with donors and fund holders to manage the grant disbursement process for donor-advised and designated funds
- Solicit and oversee management of agency endowments
- Establish systems to secure and manage fiscal sponsorships

Marketing and Communications

- Support marketing and communications staff to ensure that SBF's strategy and goals are articulated to constituents – donors, fund holders, community leaders and community-based organizations – in a clear, approachable fashion, particularly as the business model evolves
- Oversee division responsible for brand strategies and integrated campaigns
- In support of SBF's strategic goals, lead staff, vendors and interdepartmental teams to innovate and deliver communications programs that grow partnerships, promote charitable giving and advance donor, partner, and community engagement
- Ensure communication strategy that has clear, meaningful content and messaging for a diverse set of stakeholders
- Ensure that marketing and communications activities correlate with increase in donor retention and acquisition, increase in client base and support of brand awareness and positive reputation
- Manage Director of Communications who supervises two Communications Officers. Oversee the following activities:
 - production of annual reports and production of periodic newsletters
 - advertising opportunities
 - targeted and effective messaging
 - event production for special events
 - public relations including press relations, article production, op eds, special campaigns, etc
 - internal communications
 - social media platforms that increase presence and growth; website content and usage

Profile of the Successful Candidate

SBF seeks a seasoned, hands-on and participative leader who can serve as a strategic thought partner and easily engage with a wide variety of donors and other constituents. The successful candidate will truly enjoy getting to know a wide variety of Santa Barbara County residents and will take great pleasure in serving the interests of the community. SBF's next Vice President, Development and Donor Services will have strong people and process management, organizational, analytical, communication and fundraising skills.

More specifically, SBF seeks a 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
- At least 10+ years of senior-level management experience, with at least five years managing wide-ranging fundraising, gift planning or donor relations responsibilities for a \$5 million to \$10 million organization or business unit; the successful candidate will have experience leading planning efforts and running operationally effective organizations that have multiple functional areas
- Significant leadership experience in the private, public, independent, or foundation sector
- Successful experience working in a fast-paced, multifaceted and 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
- A successful track record in setting priorities; keen analytic, organization and problem solving which support and enable sound decision making
- Understanding and comfort with business modelling and analysis
- Ability to foster a trusting work environment that results in efficient and effective organizational management and a healthy and positive workplace culture
- 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 excellent listening skills

- Strong internal service orientation
- Excitement about and a commitment to the mission of the Foundation

The selected candidate will also likely have:

- CFRE certification
- Familiarity with legal issues as they pertain to donor tools and intent

Start Timeframe

We seek to have someone in place by early Q1 2021.

Compensation

This position offers a competitive salary, and the foundation provides excellent benefits. We actively welcome all candidates from a wide range of backgrounds who have the skills to join and help 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 Melissa Ulum, Of Counsel. 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.