

MORRIS & BERGER

Consultants in Executive Search

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Position Description

PRESIDENT AND CHIEF EXECUTIVE OFFICER

**COMMUNITY FOUNDATION SONOMA COUNTY
(Santa Rosa, California)**

COMMUNITY FOUNDATION SONOMA COUNTY:

Established in 1983, Community Foundation Sonoma County (CFSC) is one of Sonoma County's largest private sources of funding for nonprofit agencies. CFSC invests in programs that enhance the community in the areas of education, the environment, health and human services, and arts and culture. Community Foundation Sonoma County believes in the power of connecting people, ideas and resources to improve the lives of those who live here. Every day, partnerships are created with donors, organizations and community leaders to invest in the promise of Sonoma County.

At its core, CFSC has three key strengths: personalized service for donors, expertise on local organizations and programs, and the ability to act as a catalyst in addressing community issues. CFSC has charitable assets of approximately \$150 million and more than 400 funds established by donors and agencies. Over its lifetime, CFSC has made grants totaling more than \$120 million.

CFSC has a volunteer Board of 21 and a talented staff of thirteen. They have a robust structure of support from committees working in development, distribution, investment management, audit, human resources, governance, and others from time to time. Part of the organization's strength in growing their asset base is an active group of Professional Advisors who meet regularly and schedule programs on issues relevant to professional advisors and clients.

CFSC has four supporting organizations: DeMeo Teen Club, Pepperwood Foundation, Oliver Ranch Foundation and Sonoma Paradiso Foundation. CFSC has two strong and vital regional affiliates: the Sonoma Valley Fund and the Healdsburg Area Fund. In 2012, CFSC is establishing a new Scholarship Fund that will operate as a department of the Community Foundation. Its goal is to help young people with financial aid and resources to obtain a college education and find success.

The 2012 operating budget of the Foundation is \$1.6 million and they expect to make \$10 million in grants. A major emphasis will be on long-term stability and growth in legacy funds.

RESPONSIBILITIES OF POSITION:

Community Foundation Sonoma County seeks a President and Chief Executive Officer who will provide dynamic and forward-thinking leadership, promoting the fulfillment of CFSC's mission and objectives. The President and CEO will serve as the spokesperson and face of CFSC to donors, grantees and Sonoma County at large. The new President and CEO will have a broad-based mix of experiences and skills to promote philanthropy, lead grant making and manage a complex enterprise.

Under the direction of the Board of Directors, the President and CEO will build on the management and organizational structure that the incumbent has instituted, and also respond to a recent series of strategic planning sessions.

Specific Responsibilities Include:

- Serving as CFSC's chief spokesperson and community liaison - serving on committees, participating in forums, building partnerships, representing CFSC's overall mission and objectives, and establishing working relationships with people involved in economic development, education, human services, arts, health, and other community organizations.
- Providing strategic direction for development, leading in the cultivation of donors and presiding over complex negotiations for planned gifts.
- Collaborating with stakeholders to develop and implement strategies to achieve the objectives of the organization within all appropriate rules, regulations and policies.
- With CFSC's Board of Directors, supporting the vision and mission of the Foundation through the effective implementation of a strategic plan. Establishing appropriate metrics against which success will be evaluated.
- Inspiring and mobilizing current and future donors to make a difference in Sonoma County.
- Establishing responsible and meaningful fundraising goals, maintaining the proper tools and methodology for their accomplishment, and developing measurement, tracking and reporting mechanisms.
- Growing the assets and endowment for the benefit of the community and the long-term sustainability of CFSC.

- Developing and implementing CFSC's program goals and areas of focus, while establishing appropriate budgets. Keeping abreast of significant community issues affecting funding decisions. Developing effective partnerships to maximize funding.
- Overseeing financial elements of CFSC, assuring responsible fiscal management and reporting, investment stewardship and oversight, budgeting, and adherence to audit and national foundation standards.
- Conducting business consistent with CFSC's by-laws and governance policies, seeking Board of Directors approval as required or as requested by the Board. Executing all activities and decisions in a legally compliant, ethical and transparent manner, ensuring CFSC's resources are used in a fiscally responsible manner.
- Attracting, recruiting, hiring, training, and retaining the people required to meet and exceed organizational objectives. Establishing and maintaining appropriate benefit and compensation programs.
- Establishing and maintaining a program of staff training and cross-training for appropriate succession opportunities. Assuring appropriate use of facilities and technology.
- Providing staff and support for board committees to result in maximum success.

CAREER PATH LEADING TO THIS POSITION:

The President and CEO needs to be an accomplished development professional, a skilled communicator and someone who has a passion for community work. Candidates with experience in organized philanthropy and a proven record of growing the permanent endowment of a community foundation or similar organization are encouraged to apply. Candidates with a combination of education, experience and training that would allow them to deliver outstanding results are also encouraged to apply. Additionally, the successful candidate will have:

- Demonstrable success in securing large capital gifts for charitable uses.
- Successful experience in philanthropy, development and fundraising, financial management, general management, human resources, program development, board relations and public-policy making.
- Business acumen, organizational skills and an understanding that philanthropy is about relationships with prospective donors and the community.
- Leadership skills that demonstrate the ability to establish rapport and credibility with major donors, potential donors and community organizations.

- A strong and broad background demonstrating acumen and capability for leading an organization in a constantly changing world.
- A career path demonstrating broad intellectual interests bridging traditional disciplinary and functional boundaries.
- Past experience in translating strategic goals and direction into actionable and measurable programs.
- A successful track record as a leader who values integrity, accountability, action and transparency.
- A successful track record as a consensus builder, collaborator and team-player.

COMPENSATION:

Compensation will depend on experience and qualifications. A generous benefits package will be included.

TO APPLY:

Please direct inquires, nominations, and applications, including resume and a letter of interest in confidence to:

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Electronic submission is encouraged