



CARLSONBECK

EXECUTIVE SEARCH FOR PHILANTHROPY & NONPROFITS

Position Specification



President & Chief Executive Officer

13 September 2022



Carlson Beck advises **Community Foundation Sonoma County** on the basis of an exclusive consulting assignment. The following details are for your information and should be shared with discretion.



POSITION SPECIFICATION

COMMUNITY FOUNDATION SONOMA COUNTY

THE POSITION: PRESIDENT & CHIEF EXECUTIVE OFFICER

REPORTS TO: BOARD OF DIRECTORS

LOCATION: SANTA ROSA, CALIFORNIA

A Compelling Philanthropic Leadership Opportunity

The Board of Directors of Community Foundation Sonoma County (CFSC) seeks a visionary executive leader with the experience, knowledge, and capacity to lead the evolution of this dynamic organization as it works to become the catalyzing philanthropic voice for investing in community and climate resilience, equitable opportunities and solutions to historic social challenges, and amplifying the rich cultural diversity of the people who live in Sonoma County.

The ideal CFSC President & CEO (“CEO”) must communicate the power of this community foundation to convene, inform, and galvanize leaders in all sectors for positive impact in CFSC’s communities. Their leadership should draw from a history of authentically engaging a broad array of diverse communities and stakeholders to design bold solutions that bring next-level impact and outcomes that will propel the organization into the future.

This is an opportunity for the new leader to listen and understand the deep-seated climate, social, economic, and racial justice challenges facing Sonoma County, and to connect with donors and community leaders who seek to make a profound impact in bettering the lives of everyone in Sonoma County.

CFSC aspires to be a leader for equity by example and action, to create understanding in this diverse community, and provide a platform for inclusive conversations leading to a healthy, thriving community. The new CEO must understand and believe in the power of community philanthropy and the positive community impacts made possible by CFSC specifically. The new CEO’s success will be measured by their ability to create impact, catalyze community leaders, and connect with the generous donors who make this work possible.

THE POSITION

The CEO provides visionary and strategic leadership as well as savvy executive management that advances the mission and goals set by the Board of Directors and is responsible for the overall cohesion and management of this complex organization. The CEO integrates the means and methods of continuity with innovation and targeted strategies that meet community needs.



Upon their hiring, the CEO will work collaboratively with the Board and staff to chart a course for building organizational stability and sustainability over a 12-month transition period and beyond. This includes hiring two critical open positions—Vice President, Finance and Operations and Vice President, Philanthropy. They will then lead this collaborative through a planning process to grow CFSC resources, including determining the future and replenishment of the Sonoma County Resilience Fund—the foundation’s highly impactful disaster recovery fund. The CEO will lead the foundation’s equity work focusing on both internal diversity, equity, and inclusion efforts and external efforts to ensure that community voices are included in, and informing, CFSC’s strategies.

Externally, the CEO will play a critical role as a community leader during uncertain and evolving times. To that end, the CEO will work to understand and connect with the nonprofit organizations, communities, and the formal and informal leaders affecting positive change in the County, building relationships and bridges to further collaboration. The CEO will also build relationships with donors and prospective donors, inspiring generosity and awakening curiosity and hope in the hearts of the donors who turn to the foundation for philanthropic advising. The CEO will reinforce CFSC’s role as a trusted partner in the community and guard the trust that is built with humility, grace, and the highest integrity.

The landscape of philanthropy is changing, and the next executive leader will lead that change at CFSC.

The Profile

The CEO brings an executive leadership profile and public presence to the community, raising the visibility of the foundation, informing and educating members of the larger community on the foundation’s leadership role in philanthropy, and providing transparency in how CFSC fulfills its mission.

The CEO serves as the chief inspiration officer and must bring excellent verbal and written communication skills to internal and external audiences, serving as visionary, ambassador, and leader.

The CEO, and executive leadership, balance the needs of a wide variety of stakeholders—from staff and donors, to elected officials, government agencies and institutions, nonprofit organizations, investment advisors, and others—who share common interest in philanthropy in general but may sometimes have competing priorities. The CEO must bring well developed and well demonstrated diplomatic and political skills, incorporating nuance and subtleties. The CEO will have a track record of successfully navigating competing interests among various stakeholders.

The CEO possesses strong management skills, developed potentially via multi-sector leadership and management roles, to navigate the complexity of CFSC as an entity and the foundation’s role in the larger community. The CEO will have a demonstrated track record of successfully managing multiple priorities and competing demands in one or more professional environments. The CEO will have demonstrated professional success in sophisticated organizational structures, dynamics, and decision-making paradigms.

The CEO partners closely with the members of the Board of Directors, the staff, and external stakeholders. The CEO possesses strong collaboration skills, internally and externally, and thrives on working and meeting with diverse community members throughout the county to listen and learn about the community through their perspectives and to educate and inform about the foundation’s work. The CEO ensures productive collaborative action for attaining mutual community goals and objectives.



The CEO possesses cultural sensitivity reflected in a track record demonstrating commitment to Diversity, Equity, and Inclusion (DEI), including supporting board- and staff-focused efforts and initiatives. The CEO brings cultural competency to their leadership role and actions, internally and in the community.

The CEO demonstrates a history of attracting and retaining talented staff as well as the capacity to develop and retain current high-performing staff who possess deep expertise in the foundation's work. The CEO is humble and internally collaborative, supportive in management style, while appropriately delegating and holding staff accountable. The CEO will be known for excellence in mentoring the foundation's staff as its future leaders.

The CEO, in strong partnership with the Vice President, Finance and Operations (open position), manages the financial health and integrity of the foundation. This includes understanding the drivers of CFSC's financial condition, areas where financial tradeoffs are possible, and ensuring fiduciary standards are being met. The CEO will have experience with significant or comparable financial management responsibilities.

The CEO, in strong partnership with the Vice President, Philanthropy, (open position) manages and joins in the fundraising and endowment growth for the organization.

The CEO, in strong partnership with Vice President, Community Impact, oversees an annual grantmaking budget of approximately \$6 million.

Responsibilities

Strategic Leadership

- Leads the organization, in collaboration with the Board of Directors and staff, on organizational goals and objectives, strategies, and execution of actions to advance CFSC's mission, vision and brand as a leader in community philanthropy.
- Nurtures high levels of engagement with community members and external partners, including financial and legal advisors, nonprofit organizations, business partners, and other community stakeholders in advancing CFSC's mission and impact.
- Creates a leading-edge organization viewed as a leader and innovator within the community foundation field.
- Serves as agent of the Board of Directors, providing fiduciary responsibility over the assets and goodwill of the foundation while maintaining staff capacity, systems, and controls to that end.
- Nurtures an organizational culture reflective of the foundation's values.
- Ensures alignment of staff and Board on organizational priorities.
- Recruits, develops, and retains exemplary professionals for both Board and staff.

Community Building and Advocacy / External Relations

- Serves as the primary spokesperson for the foundation; takes a proactive stance externally to raise CFSC's profile and visibility in the County. Ensures greater understanding of CFSC's role and responsibilities as a community foundation, how it leverages philanthropic assets, and how it works with community-based leaders and organizations.
- Interacts with a broad range of community and political leaders, identifying and shaping opportunities for the foundation to serve as a leader and convener on complex or contentious issues and needs.
- Advances policy advocacy, when appropriate, effectively communicating the foundation's perspective and priorities.

- Fundraises on behalf of the foundation by cultivating and strengthening relationships with current and prospective donors and their financial or legal advisors.

Financial and Organizational Management

- In partnership with the VP, Finance and Operations, strives for excellence and oversees consistent professional practices, systems, and processes throughout CFSC.
- Serves as the financial steward for the assets under management including working collaboratively with professional advisors, donors, and investment advisors.
- Ensures the financial and overall health of the organization, including annual budgeting and forecasting.
- Develops a culture that seeks to understand different perspectives and embraces diversity, equity, and inclusion; leads an organizational culture that is healthy, balanced, encourages excellence in work performance as well as self-care.
- Provides timely feedback, coaching, and mentoring to staff. Ensures that work expectations are clearly understood and in alignment between the foundation and staff members. Ensures that performance metrics are well articulated and known by each team member.

CANDIDATE QUALIFICATIONS / EXPERIENCE / ATTRIBUTES

Education: An undergraduate degree, or equivalent experience, in a field that provides in-depth understanding of problem-solving approaches, research methodologies, organizational and community development systems, budget development and financial statements analysis, as well as social, educational and economic systems. An advanced degree may be viewed as a positive.

Experience: Minimum of ten years of progressively responsible experience in the private, public, or nonprofit sectors. Prior experience with a community foundation is a strong positive.

A well-qualified candidate will bring a demonstrated track record of success in the following areas:

- Executive level experience in the corporate, educational, foundation, governmental or nonprofit sector.
- Leadership and management experience in operating a complex, growth-oriented organization with the ability to attract and retain exceptional team members.
- Experience raising the profile and visibility of an enterprise via public speaking, community engagement, being a vibrant and effective external presence in the community.
- Ability to address major community issues as a leader, convener, facilitator, or collaborator.
- Strong management skills including engaging direct and indirect reports; participating in staff selection; providing timely, relevant, and accurate feedback related to performance; ensuring clarity of performance expectations, metrics, and accountabilities; and administering disciplinary action, as warranted.

The successful candidate will **be**:

- **Passionate** about CFSC's mission and the power of community philanthropy.
- A **strategic thinker and planner** and **experienced implementer**.

- A **persuasive fundraiser** regarding CFSC’s mission and value proposition; able to present sophisticated rationales, such as mutual benefit to donor and community, as well as technical aspects such as fee structure.
- A **relationship builder**, skilled in artfully managing external relations with stakeholder groups; comfortable with a wide array of community members, including business and political leaders
- **Culturally competent**, with a commitment to and comfort level with working with a wide array of diverse individuals; an advocate for diversity, equity, and inclusion.
- Focused on **building funds** as foundational to CFSC’s ability to affect change and have impact.
- Experienced in **partnering with a Board of Directors**, supporting board recruitment and development to engender stability and next level governance.
- **Collegial, respectful, supportive and empowering** of CFSC’s staff while holding to standards of excellence and accountability.
- Skilled at the **art of prioritizing and managing competing objectives and demands** while maintaining CFSC’s position and best interests.
- Able to make **difficult decisions** and articulate the decision rationale when appropriate.
- Appropriately **transparent** in communication and information sharing.
- **Collaborative, patient, flexible, persistent.**
- Supportive of **technological advances** that serve CFSC’s work, audiences, and mission.
- **Authentic and humble.**

The successful candidate will **have**:

- **A customer service mindset** that infuses their executive style.
- Technical knowledge of **philanthropy**.
- A **high level of ease with being externally focused** on building relationships with community members, CBO leaders, donors, and other community decision makers and influencers.
- Demonstrated **accessibility**, internally to staff and externally to community members.
- **Synthesizing** abilities with disparate information along with proficient **writing and editing** skills; compelling **communication skills** including excellent **listening skills**.
- An orientation towards **policy advocacy** when appropriate.
- Excellent **interpersonal** skills with the ability to work well in a team environment.
- Ability to **collaborate and develop consensus**.
- Excellent track record of effective **diplomacy**.
- Unquestionable professional **integrity and ethics**.
- A **sense of humor** and a **containable ego**.

ABOUT COMMUNITY FOUNDATION SONOMA COUNTY

At Community Foundation Sonoma County, the Board and staff believe in the power of connecting people, ideas, and resources to benefit all who live in Sonoma County. Established in 1983 by a group of local community leaders, CFSC fosters philanthropic growth and supports the long-term sustainability for its nonprofit partners. As a public 501(c)3 nonprofit, CFSC invests in the promise of Sonoma County through its local knowledge, leveraged philanthropic resources, and its legacy inspiration and planning.

In meeting its core mission, CFSC brings three key strengths:

- Personalized service for donors;
- Expertise in local organizations and programs; and
- The ability to function as a catalyst in addressing community issues.



As an organization deeply connected to this place and the people who call it home, CFSC is acutely aware of what makes Sonoma County special. It is also sharply cognizant of the disparities in who has access to what they need to thrive. Each day the foundation strives to close the gap in those disparities, through its work with donors, its grantmaking, and by taking leadership in larger initiatives to tackle complex community issues.

The foundation’s work is guided by its Values Statement. Community Foundation Sonoma County:

- Knows that in order to create a fair and just community, some may need more to achieve the same.
- Embraces community differences and the community common bond.
- Cultivates leaders, supporting them to advocate for their communities and empowering them to create change.
- Promises to tackle tough issues with compassion and courage, choosing humbly to take a step forward instead of resting in the comfort of where it is.

Organizational Structure and Finance

CFSC has assets of over \$227 million in more than 400 charitable funds created by individuals, families, community-based organizations, and businesses. These assets are governed by the Board of Directors and an Investment Advisory Committee representing a cross-section of Sonoma County's business, civic and philanthropic leaders, as well as by the President & CEO. Since inception, CFSC has awarded grants totaling more than \$275 million to organizations across all corners of the county and beyond.

CFSC has a volunteer Board of 15 community, business, and nonprofit leaders. There is a talented staff of 18 dedicated, mission-driven professionals. The Board and staff benefit from organizational governance comprised of a robust structure of support from committees working in investment management, finance, audit, grantmaking, governance, as well as diversity, equity, and inclusion. Additional ad hoc committees are created as needed.

CFSC has an \$18.5 million annual operating budget.

For additional information on Community Foundation Sonoma County, please visit www.sonomacf.org.

ABOUT SONOMA COUNTY

Sonoma County is a place of profound natural beauty. Its western border is the Pacific Ocean. Its eastern border is the grape-growing, wine-producing, and agricultural regions of Napa and Lake County. The North-South boundaries are the counties of Mendocino and Marin, respectively. It is a mere 30 miles north of San Francisco and it is a large, urban-rural county encompassing 1,575 square miles.

Complementing the narrative description above is a video showing the natural beauty, food and wine industries, and the diverse activities available in Sonoma County: https://youtu.be/4k6_zZfC0kg

There are 494,336 residents in Sonoma County, with a demographic mix of:

- 63% White
- 28% Hispanic/Latinx
- 5% Asian and Pacific Islander
- 2% African American/Black
- 2% Native American



Residents inhabit nine cities and a large unincorporated area, including many geographically isolated communities surrounded by vibrant open space, vineyards, and farmland. The majority of the county's population resides within its cities. Santa Rosa is the largest city with a population of 175,232; it is the service hub for the entire county.

Santa Rosa's regional airport has nonstop service to Los Angeles, San Diego, Portland, Seattle, Las Vegas, Denver, and Dallas.

Sonoma County is one of California's top food-and-wine destinations, home to more than 425 wineries and best-in-class, award-winning restaurants. Popular local attractions and outdoor activities include the Sonoma Coast, Armstrong Redwoods State Natural Reserve, Jack London State Historic Park, Charles M. Schulz Museum, Green Music Center, and Luther Burbank Home & Gardens.

Sonoma County Tourism Office provides coverage of a wide range of Sonoma County offerings if planning a visit: <https://www.sonomacounty.com/>

Two recent research reports provide insights into Sonoma County's strengths and challenges:

Leading Through Listening In Sonoma County: YouthTruth Survey 2021
<https://youthtruthsurvey.org/sonoma-county/>

A Portrait of Sonoma County
<https://measureofamerica.org/sonoma/>

CONTACT INFORMATION

CFSC is an equal opportunity employer and encourages the candidacy of all professionals.

For additional information regarding this opportunity, please contact:

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