



CARLSONBECK

EXECUTIVE SEARCH FOR PHILANTHROPY & NONPROFITS

## Position Specification



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### Chief Executive Officer

22 November 2024, vF



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



## POSITION SPECIFICATION

### THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY

**THE POSITION:** CHIEF EXECUTIVE OFFICER

**REPORTS TO:** BOARD OF DIRECTORS

**LOCATION:** SAN LUIS OBISPO, CALIFORNIA

#### *Executive Leadership of a Trusted Philanthropic Thought Leader*

The Board of Directors of **The Community Foundation San Luis Obispo County** (“CFSLOCO” or “the Foundation”) seeks a visionary executive leader with the knowledge and integrity to lead this trusted community organization.

The Community Foundation San Luis Obispo County serves as a key resource for charitable donations and is among the largest funding organizations in the area. It provides charitable funds to individuals, families, and nonprofits, with most funds being endowed to guarantee ongoing support for vital causes. **The Foundation is dedicated to connecting people who care with causes that matter.**

The Foundation has been the region’s trusted steward of philanthropic funds for 25 years; at present, it manages almost \$84 million in charitable assets in 300+ charitable funds created by individuals, families, community-based organizations, and businesses. These assets are governed by the Board of Directors and an Investment Committee representing a cross section of San Luis Obispo County’s business, civic, and philanthropic leaders, as well as by the Chief Executive Officer.

Since 1998, the Foundation has granted over \$66 million to support significant community initiatives and has awarded 1,400 scholarships to local students. In addition to overseeing its charitable funds, the Foundation collaborates with its fundholders and other local leaders to enhance the Central Coast region through strategic grantmaking and impact initiatives aimed at creating a more vibrant and equitable community for everyone.

The ideal **Chief Executive Officer (“CEO”)** represents the power of CFSLOCO to connect donors with community leaders and organizations serving individuals and families in need to achieve positive social impact. The new CEO reflects to the region a mindset of problem solving and innovation, seeking to understand and address community challenges. The Foundation serves as a nonpartisan community leader and collaborator, listening to, respecting, and convening all community members.

CFSLOCO has a volunteer Board of 13 community, business, and nonprofit leaders. There is a talented staff of 10 dedicated, mission-driven professionals. The annual operating budget is \$2 million.



For additional information on The Community Foundation San Luis Obispo County, please visit [www.cfsloco.org](http://www.cfsloco.org).

**THE POSITION**

The CEO provides visionary and strategic leadership to CFSLOCO as well as savvy executive management that advances the mission and goals set by the Board of Directors. The CEO is responsible for the overall cohesion, management, and operations of this complex organization. The CEO serves as the chief inspiration officer and community thought partner, bringing excellent verbal and written communication skills to internal and external audiences, to meet community needs.

The CEO plays a critical role as a philanthropic leader -- attracting new donors and working with existing donors to achieve positive community impact. The CEO connects donors with nonprofit organizations and community leaders, building relationships to promote collaboration and impact. The CEO serves as a trusted advisor to donors, emphasizing the critical importance of the fiduciary management of their funds, and ensuring that those funds are handled ethically and with integrity. The CEO inspires generosity by awakening curiosity and hope in the hearts of the donors who turn to the Foundation for philanthropic advising.

The CEO possesses strong collaboration skills, internally and externally, and thrives on working with diverse community members throughout the County to listen and learn about the community from their perspectives as well as to educate and inform them about the Foundation’s work. The CEO embodies and reinforces the Foundation’s role as a trusted advisor and philanthropic partner.

The CEO leverages the strong and highly competent staff to increase strategic donor cultivation, engagement, and communication, resulting in significant growth for CFSLOCO through fundraising, influence, and coalition building. The CEO recruits high-potential, high-capacity staff, and retains 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 mentors the Foundation’s staff as its future leaders, providing specific opportunities for professional growth and development.

**Responsibilities**

***Philanthropic Services***

- Fundraises on behalf of the Foundation by cultivating and strengthening relationships with current and prospective donors and their financial or legal advisors. Educates and informs donors and prospects for greater understanding of CFSLOCO’s role and responsibilities as a community foundation, how it leverages philanthropic assets, and how it works with community-based leaders and organizations.
- Serves as the primary spokesperson for the Foundation; takes a proactive stance externally to raise CFSLOCO’s visibility with a wide range of community partners and members in the County.
- Serves as agent of the Board of Directors, providing fiduciary responsibility over the assets and goodwill of the Foundation. Serves as the financial steward for assets under management, including working collaboratively with professional investment and financial advisors as well as donors.



**Board of Directors Relations**

- Strategically partners with and advises the Board of Directors in the governance of the Foundation.
- Ensures the development of the Board, strategically partnering with the Executive and Nominating Committees on recruitment of new Board members.
- Supports the Board’s efforts to increase diversity, equity, and inclusion.

**Programs and Grantmaking**

- Nurtures high levels of engagement with elected officials, financial and legal advisors, nonprofit executives, business partners, and other community stakeholders in identifying and shaping opportunities for the Foundation to serve as a leader and convener on complex or contentious issues and needs.
- Oversees grantmaking programs to local, regional, and other grantees per donors’ directives; designs community initiatives to meet specific needs and engages donors in supportive grantmaking.
- Ensures scholarship programs are well designed and implemented to a standard of excellence.

**External Relations and Community Building**

- Participates in the League of California Community Foundations, and other local, regional and national philanthropic associations as warranted.
- Represents CFSLOCO at community events; gives presentations as the executive leader of the Foundation.
- Performs other actions to increase the visibility and presence of the Foundation.

**Organizational Management**

- Leads the organization, in collaboration with the Board and staff, on establishing and communicating organizational vision and mission, as well as management strategies to bring them to life.
- Manages the financial health and sustainability of the organization, including annual budgeting, forecasting, reporting, and compliance audits.
- Recruits, develops, and retains exemplary staff members who feel empowered and trusted, ensuring staffing meets the demands of the Foundation’s work; aligns salary structures to be internally aligned and externally competitive in the local market. Oversees high quality onboarding and training processes.

**CANDIDATE QUALIFICATIONS / EXPERIENCE / ATTRIBUTES**

**Education:** An undergraduate degree, or equivalent experience. An advanced degree may be viewed favorably.

**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, including management experience in a complex, growth-oriented



organization with the ability to attract, develop, and retain exceptional team members.

- **Experience raising funds** from prospective and existing donors to further the growth of an enterprise; experience raising the profile and visibility of an enterprise via public speaking, community engagement, and being a vibrant and inspiring thought partner to donors and community leaders.
- **Ability to address major community issues** as a leader, convener, facilitator, or collaborator.

The successful candidate will **be**:

- **Passionate** about CFSLOCO's mission and the power of community philanthropy.
- A **persuasive fundraiser** regarding CFSLOCO's mission and value proposition; able to present sophisticated rationales as well as technical aspects in an accessible manner. Focused on **building funds** as foundational to CFSLOCO's ability to affect change and have impact.
- Ethical and a faithful steward of donor funds.
- Experienced in **partnering with a Board of Directors**, supporting board recruitment and development to engender stability and next level governance.
- **Culturally competent**, with a comfort level with working with a wide array of diverse individuals; an advocate for increased diversity, equity, and inclusion.
- A **strategic thinker and planner** and **experienced implementer**.
- **Collegial, respectful, supportive and empowering** of CFSLOCO's staff while holding to standards of excellence and accountability.

The successful candidate will **have**:

- **A customer service mindset** that infuses their executive style and a growth mindset to meet organizational objectives.
- Technical knowledge of **philanthropy**.
- A **high level of ease with being externally focused** on building relationships with community members, nonprofit leaders, donors, and other community decision makers and influencers.
- Excellent **interpersonal** skills, including **active listening** and team orientation.
- Unquestionable professional **integrity and ethics**.

## COMPENSATION

An annual salary ranging from **\$220,000 to \$260,000** will be offered, commensurate with experience, plus a comprehensive benefits package.

## CONTACT INFORMATION

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

For additional information regarding this opportunity, please contact:

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