



Position Specification

San Francisco Foundation

Chief Philanthropy Officer

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Our Client

Founded in 1948, the San Francisco Foundation (SFF) is one of the nation's largest community foundations — a grantmaking public charity dedicated to advancing racial equity and economic inclusion to ensure that everyone in the Bay Area has a chance to attend a good school, get a good job, live in a safe and affordable home, and have a strong political voice. Their mission is to mobilize resources together with community leaders, nonprofits, and donors, and act as a catalyst for change to build strong communities, foster civic leadership, and promote philanthropy in the San Francisco Bay Area.

They are proud to call themselves a community foundation. That means they take the time to understand what's important to donors, so that they can provide customized service for donor needs. They have a team of programmatic experts who intimately understand the social and economic challenges in the Bay Area and have deep relationships with the nonprofits and policymakers that are most effectively tackling those challenges.

They want all people in the Bay Area to be economically secure, rooted in vibrant communities, and civically engaged. SFF has distributed \$2.75 Billion in grants to nonprofits since 1948. They funded over 3,000 non profits in 2019 and had upwards of \$1.5 Billion in Assets, made possible by donors. SFF has intentionally prioritized race and socioeconomic status in their grantmaking because low-income people of color face systemic barriers when it comes to housing, education, criminal justice, jobs, and civic participation. The future of the Bay Area depends on the ability to ensure that everyone can participate, prosper, and reach their full potential.

Their equity grantmaking is structured under three interconnected pathways:

- **People Pathway:** Advancing the economic security of low-income people of color in the Bay Area.
- **Place Pathway:** Anchoring the region's neighborhoods so that all residents, particularly low-income people of color, can live, work, thrive, and create.
- **Power Pathway:** Ensuring that people of color, low-income residents, and youth have a strong political voice and can shape the decisions that affect their lives and communities.

Together with community leaders, nonprofits, and donors, SFF is committed to advancing racial equity and economic inclusion to ensure that everyone in the Bay Area has a chance to attend a good school, get a good job, live in a safe and affordable home, and have a strong political voice.

For more information, please refer to SFF's website: [sff.org](https://www.sff.org)

The Role

The San Francisco Foundation is actively mobilizing resources towards increasing racial equity and economic inclusion and civic engagement, and to advancing advocacy and equitable policy positions. The next Chief Philanthropy Officer (CPO) has a rare opportunity to take a thriving, mission-driven community foundation to a new level of philanthropic impact in the Bay Area. SFF is seeking a skilled and nimble executive who will build upon the current legacy of SFF while leveraging a growing donor base in one of the wealthiest, most dynamic regions in the world. The next CPO will bring leadership and acumen to the development team and be a natural advocate for the people of the region. SFF recognizes that philanthropy has long been hampered by the sector's failure to reflect the communities that its institutions serve. At the San Francisco Foundation, equity, inclusion, and diversity are core to the success of the internal operations as well.

Reporting to and partnering with the Chief Executive Officer, the CPO sets strategy and oversees all development and donor engagement functions and processes for SFF. As a member of the senior management team, the CPO also has a leadership role in addressing issues including but not limited to fund development, organizational change, and governance. The San Francisco Foundation thrives through a culture of internal collaboration, and this individual's leadership must play out as a member of this team. This individual will also serve as a vocal champion for the racial equity and community strategies of SFF and will present articulately to a host of different audiences.

The CPO will identify fundraising needs in relation to existing programs. They will develop attainable fundraising strategies, both near and long-term, in the areas of annual giving, major gift campaigns, planned giving, special events, and endowment building. The Chief Philanthropy Officer will explore new areas of development revenue. They will evaluate existing and new methods of donor solicitation, cultivation and communication recognition and affinity programs to ensure that current and prospective donors are informed and connected to the Foundation's mission, work and accomplishments.

The CPO will play an instrumental role in the Foundations' 75th anniversary and the fundraising aspects linked to this event.

CPO will also champion and support donor stewardship strategies and plans to meet donors' philanthropic needs and encourage more donor aligned grant making with the Foundation.

The Chief Philanthropy Officer will evaluate strategies regularly and adjust, as needed, to achieve goals. The internal leveraging of existing relationships and board members will be examined in an effort to increase revenue and participation in fundraising activity. The Chief Philanthropy Officer will take a very hands-on and active role with the solicitation and stewardship of major donors as well as engaging in ongoing communication with the executive leadership and Board ensuring "buy-in" to initiatives at the highest level.

The Chief Philanthropy Officer will manage the development staff, providing training, mentoring and ongoing performance evaluation. The Chief Philanthropy Officer will provide resources designed to improve efficiency and productivity of staff members. The CPO will ensure a culture of respect while encouraging communication and accountability within their staff.

The Chief Philanthropy Officer will be a champion of the Foundation's strong culture and equity, diversity, and inclusion initiatives. This person will bring commitment, ideas, and energy to the Foundation's work on diversity in its workforce, donor base, and broader community.

It is paramount to the Foundation, that the successful candidate has absolute commitment and passion to racial and economic justice, and towards realizing a community that achieves fundamental fairness and equity for all. The must have a deep and proven belief in the need to serve and give voice to under-resourced populations. The successful candidate will have demonstrated experience working with diverse communities and a strong commitment to these values.

Key responsibilities for this role include:

Strategic Fundraising, Leadership and Execution

- Provide leadership and oversight for all aspects of the development program including donor stewardship, new fund acquisition, the annual fund, major gifts, planned giving and development operations.
- Deliver technical expertise and sophisticated understanding in the advanced techniques and methods of charitable giving and philanthropy, including the acceptance of complex assets, fund administration, grant making and impact investing while bringing a high level of systems management and efficiency.
- Develop a strategy and plan for evolving development organizational structures, roles, and tasks to meet the needs of the strategic plan. Supervise the development team, encouraging and nurturing their potential with strong leadership and opportunities for professional development.
- Partner with the CEO to plan and execute strategies for his engagement with prospect/donor cultivation and solicitation.
- Develop, execute, monitor and evaluate annual development plans, ensuring targets are met. Support the planning and management of endowment and other campaigns.
- Provide leadership and direction for the Foundation's 75th anniversary campaign.
- Partner with the Chief Financial Officer to identify and successfully implement new revenue streams supporting the Foundation's operations.
- Manage and engage the Foundation's Philanthropic and Gift Planning Committee of the Board to increase fundraising results.

- Lead The San Francisco Foundation in building on its impact by increasing assets and attracting a broader diversity of high net-worth and next generation funding base.

Donor Cultivation

- Manage the cultivation, solicitation of prospects and donors.
- Provide leadership for the Board of Trustees in identifying and securing philanthropic prospects and gifts.
- Enhance team performance by implementing fundraising best practices as needed, including portfolio management systems and appropriate stewardship protocols.
- Provide inspiring representation of the organization to governance, individual donors, foundations and corporations, civic and business leadership, educational leaders, and other audiences.
- Collaborate effectively with internal leadership, other departments, program staff, and administrators; create and build appropriate and productive relationships from a development and client perspective.

Donor Stewardship and Philanthropic Advising

- Ensure an excellent donor experience that is “easy and empowering,” leading the implementation of effective technological and internal systems that supports charitable giving and donor engagement.
- Collaborate with the philanthropic services team to develop and implement donor engagement strategies.
- Inspire and influence giving in alignment with SFF’s equity agenda.
- Lead and represent SFF in the most complex donor engagements, advising clients and their financial advisors.
- Cultivate strong relationships with SFF’s founding families and top clients.

Candidate Profile

The successful candidate will be an inspiring and driven leader, and they must be results-oriented and flexible, with the ability to think creatively in identifying new opportunities and will respond to changing circumstances in an uncertain and competitive fundraising environment. The San Francisco Foundation is looking for an exceptional revenue generator and strategic thinker – someone with a track record of meeting revenue goals as well as proposing innovative and sustainable resource-generating ideas. The next CPO will establish a sense of deep connectivity with diverse supporters, many of whom have strong

philanthropic commitment inside and outside the Bay Area. They will be committed to ensuring the donors have an experience with the foundation that is “easy and empowering”. They will be a highly strategic and dynamic individual able to energize supporters around its mission. They will possess the credibility, experience, and leadership skills necessary to establish a culture of collaboration with other leaders throughout the Foundation. Above all, the Chief Philanthropy Officer will have unquestioned judgment and ethical standards, and a demonstrated commitment to diversity and inclusion.

The ideal candidate is a collaborative individual with a passion for SFF’s mission. They will possess the experience and leadership skills necessary to establish a culture of philanthropy throughout the organization, and to align SFF’s development plan to its strategic goals. A demonstrated capacity to recruit, lead, and galvanize the talents of a diverse staff and network colleagues is an integral part of this role. A proven ability to take a front-facing role as lead advocate and fundraiser for the integrated goals of the Foundation, and to be a key partner to the CEO in their cultivation activities, will be key to the success of this role.

The ideal candidate should have a strong understanding of charitable giving, including tax advantages of giving, acceptance of complex assets, planned giving and establishment of charitable funds within a community foundation.

In terms of the performance and personal competencies required for the position, we would highlight the following:

Setting Strategy

- Quickly grasps the opportunities and challenges of the Foundation and the role, and understands how to develop innovative and creative fundraising plans.
- Significant experience in major gift fundraising and proven and successful track record of working with prospective individuals and families, and their teams of professional advisors.
- Significant experience with the creation of donor stewardship and donor service strategies.
- Demonstrated ability to strategically partner with institutional leaders in the development of transformative gift ideas while also managing a development program designed to build lifelong donor relationships.
- Has strong analytical mindset and uses data to support thinking and decision-making.
- Has the flexibility to create nuanced plans and objectives that adapt to the situation and/or partners at hand, while bringing to life an inspirational future for the organization as a whole.
- Has experience evolving a fundraising program for a leading nonprofit organization with defined priorities, sophisticated metrics, and a highly sophisticated structure.
- Strong grasp of community foundation business models.

Executing for Results

- Capacity to set priorities and achieve goals, individually and for teams. Balances financial wisdom and prudence with innovation and calculated risk-taking.
- Ability to link the work of The San Francisco Foundation to the concerns of donor and prospective donors; articulate forward-thinking strategies and compelling stories that inspire and motivate constituencies to achieve ambitious revenue generation goals.
- Significant experience with development systems and process; successful track record of utilizing CRM platforms and other technology effectively.
- Demonstrated ability to strategically partner with institutional leaders in the development of transformative gift ideas while also managing a development program designed to build lifelong donor relationships at every gift band.
- Ability to work thoughtfully and decisively in complex, successful organizations seeking transformational growth; has a proven ability to set priorities, achieve individual and team goals, and demonstrate impact.
- Has an established track record of driving results, as well as developing, soliciting, and closing six and seven-figure gifts from individuals, foundations, and government sources.

Leading Teams

- Has a proven ability to recruit, mentor, lead, and develop high-performing, diverse, and loyal teams through a positive and collaborative environment.
- A flexible, inclusive approach to leadership, which adjusts to different audiences and gives focus to colleagues' work. Ability to provide leadership that will challenge, inspire, and motivate the range of people involved in and with The San Francisco Foundation.
- The personal inclination and professional ability to be a positive and unifying figure who can lead by influence and example in order to create an integrated development culture across the Foundation.
- A commitment to transparency in the service of building trust and confidence in the central advancement operation among a wide group of colleagues around the institution.

Communicating, Influencing, and Building Relationships

- Adept at establishing trust and strong relationships quickly with key constituents by demonstrating sound judgment, strategic thinking, and meaningful expertise. Builds genuine, productive relationships with others both inside and outside the organization, demonstrating strong emotional intelligence.

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- Outstanding communication skills, both written and verbal, and the ability to articulate the need for The San Francisco Foundation in an engaging way. Highly articulate; makes arguments in a clear and compelling manner and is able to motivate others to pursue common goals, who can consistently articulate the Foundation's mission in a clear and compelling manner.
 - A healthy, balanced ego and the confidence to recognize his/her own strengths and weaknesses; has a penchant for continual refinement and intellectual rigor in his/her work.

Interpersonal Acumen and Character

- A demonstrated commitment to personally oppose injustice and work toward inclusion and equity.
- Supportive consensus builder and active listener.
- Dedication to a diverse and inclusive workplace through programs and practices.
- Spirit of entrepreneurship, innovation, and creative problem-solving.
- Commitment to customer service and responsiveness.
- High energy, charisma, focus, and drive.
- Belief in the collective strength of the entire foundation.

Contact

Russell Reynolds Associates has been exclusively retained for this search and prospective candidates are invited to contact Russell Reynolds Associates directly. All inquiries and discussions will be considered strictly confidential.

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