Executive Search – Executive Director

Position Overview

Sterling Search Inc. has been exclusively retained to recruit for the new Executive Director for the Orange Catholic Foundation (OCF).

Background:

The Orange Catholic Foundation is an autonomous, pious foundation that works in collaboration with members of our Diocese of Orange to raise, manage, grow and grant funds supporting all aspects of the Catholic faith following each donor’s intent.

The Orange Catholic Foundation is an Independent 501C3 corporation that was formed in Orange County to serve the Catholic community. The Foundation helps support individuals, families, corporations, family foundations etc. with their charitable giving. OCF plans and conducts major fundraising programs and events, including the annual Conference on Business & Ethics, the semiannual Wills and Trusts Week, the annual gala and other special fundraising events. The Foundation manages endowments and other charitable long-term funds, providing grants always following donor intent in support of our Catholic community.

The Foundation has a staff of ten and oversees approximately $40 million in assets. Annual fundraising goals are established annually to meet the needs of the Catholic community. An independent Board oversees all Foundation operations.

The Diocese of Orange was created in 1976 as an outgrowth from the Archdiocese of Los Angeles. It was a small organization at the time supporting approximately 40 parishes and 500,000 Catholics in a rapidly growing Orange County.

The County of Orange growth has exploded over the past 40 years and today the Diocese supports 62 parishes, 41 schools: 2 co-ed high schools; a girl's high school; 31 parish elementary schools; and 7 additional independent Catholic schools, in a community of 1.3 million Catholics, educating 18,000 students. Orange County, like the Diocese, has seen its evolution from a suburban community of Los Angeles to a much more urban, multi-cultural and diverse environment. This transformation impacts the nature of parish life and schools in profound ways.
The community demographics have changed along with this growth. Large immigrant populations from Latin America and Asia have migrated to Orange County. The Diocese has responded with specialized programs to serve these faith based communities. Many parishes and schools have become predominantly Hispanic and/or Vietnamese in character and the Diocese has responded with multicultural priests and teachers who understand and can serve these communities.

https://orangecatholicfoundation.org/

Specific Duties and Responsibilities

The Executive Director reports directly to the Board of Directors. The Executive Director is the chief spokesperson representing the organization to constituencies, both internal and external. In addition to operational, financial, and administrative duties, the scope of responsibility includes overseeing fund development, marketing, grantmaking, community relations, and strategic thinking and planning. The Executive Director will build, foster, and maintain a balanced organizational culture that inspires mission excellence with the efficacy of best business practices, fiscal accountability, and institutional impact.

The Chief Executive Officer will:

Board and Organizational Leadership

- Report to a governing Board of Directors, executing decisions effectively and ensuring that the Board of Directors are informed of critical developments in a timely and effective manner.
- Oversees the development and approval of a strategic plan for the Orange Catholic Foundation which integrates with, and supports, the mission and strategic plan of the Diocese of Orange and the objectives as communicated by the Ordinary of the Diocese.
- Collaborates closely with the Board of Directors and staff to create vision as well as to execute the approved strategic plan and annual budget.
- In collaboration with the Board of Directors, develops and cultivates a Board that is representative of the community and upholds the best practices of Board governance.
- Plans full Board meetings with the Board Chair and participates in, and in most cases, plans Board Committee meetings with the committee chairs. Ensures the proper maintenance and retention of all Board records.

Staff Leadership

- Recruit, on-board, supervise, empower and mentor the professional development of a team of staff professionals.
- Develop and implement personnel policies and procedures to include employee handbook and updated job descriptions.
- Manage and implement an effective performance management system for all employees which will include setting objectives and evaluation of them on an annual basis.
- Lead, motivate, manage and develop staff to invoke passion about the mission of OCF, foster a culture of philanthropy and an environment committed to continuous improvement.

Fund Development

- Partner with the Board of Directors and staff to evaluate the organization’s development function and chart its philanthropic future.
• Develop a balanced funding mix of donor sources and solicitation programs tailored to the needs of the organization that will enable it to attract, retain and motivate donors and fundraising volunteers.
• Serve as the primary contact for donors, and personally manage a growing portfolio of increasingly significant donor relationships and professional advisors, by inspiring the growth of new donor-advised funds from principal and major gifts, as well as inspire new and steward the legacy of existing planned gifts.
• Design and host special donor and professional advisor events and experiences that help tangibly convey the stories and experiences of generosity to impact and support the needs of the community.
• Assure design and implementation of acknowledgment, stewardship and recognition programs with feedback and necessary check off systems.
• Oversee design and maintenance of donor and prospect records, proposals, gift management systems, and informational reports.
• Ensure compliance with all relevant regulations and laws, maintain accountability standards to donors, and ensure compliance with the code of ethical principles and standards of professional conduct for fundraising executives.

Marketing, Public Relations and Community Partnerships
• Continue to raise the public profile of OCF by serving as the spokesperson and advocate for the Foundation, as well as being a visible, visionary and influential leader and fundraiser in the community.
• Develop a strong collaboration with the Roman Catholic Diocese of Orange to raise the visibility, marketing and communications effectiveness of the foundation brand, including its digital presence, its Catholic focus, and the stories of impact of the social capital deployed within the community and throughout the region.
• Continuously assess community needs, evaluating partnership opportunities to promote programs uniquely suited to the mission.
• Foster collaborative relationships with pastors, parishes, and school communities to identify needs and to engage and support parishes and schools in their active and planned giving aspirations.

Volunteer Management
• Define and execute the strategy of effectively mobilizing volunteers in support of OCF’s mission.
• Train and form active volunteer community partners, ambassadors, and advocates, including forming a professional advisor’s group, who together in partnership, help increase Catholic generosity and successfully advance the Foundation’s mission.

Grant Management
• Oversee grant terms and agreements for awards that meet programmatic goals and administrative requirements.
• Reports statistics on the grant administration process to internal and external constituents.

Fiscal and Investment Management
• Work with the Board of Directors to create an annual budget and monitor performance against the budget. Conduct regularly reviews of the financial data, exercising control as authorized by the Board of Directors.
• Ensure fiduciary responsibility, sound financial management, and financial accountability for contributions, income, and assets. Establish effective and transparent internal controls and record keeping.
• Implement the investment policy as adopted by the Board, including primary interface with investment advisors and related outside professionals. Supervise the relationship with the outside advisor who manages investment portfolio
• Oversee risk and operational management.
• Ensure public accountability compliance; works with external auditors, as necessary, on the annual audit.

Administration and Operations
• Establish operational benchmarks and timelines to achieve strategic goals in support of the OCF strategic plan. Continually review and evaluate programs and report findings to the Board of Directors.
• Assure the filing of all legal and regulatory documents to maintain compliance with relevant laws, regulations and fiduciary requirements.
• Ensure that OCF is equipped with the appropriate tools and software to operate effectively and to maintain compliance standards.
• Execute all other reasonable duties as assigned by the Board of Directors

We are seeking candidates offering the following qualifications:

• Passion for OCF’s mission
• Models their Catholic faith in actions and deeds
• Entrepreneurial spirit, imagination, vision, leadership, and integrity
• A minimum of 10 years of major gift fundraising with individuals/corporations in a professional capacity with demonstrated results
• A minimum of 5 years of senior management experience, with increasing levels of responsibility and management of staff, preferably with direct collaboration with Boards of Directors
• Proven track record of management success with comparable P&L, planning, and operations responsibilities
• A demonstrated ability to plan and operate strategically, to build public support, to strengthen infrastructure, to inspire staff and the Board of Directors, and to develop effective programs
• Exceptional financial, organizational, and administrative skills
• Excellent knowledge of fiscal management, budgeting, and cash flow management
• The ability to plan, set goals and objectives, organize and follow through
• A strong communication skill set, and demonstrated ability to work effectively with and gain the respect and support of varied and changing constituencies, including staff, board members, church leadership, potential donors, volunteers, and others
• A team builder with a track record of effective staff management, including hiring, rewarding, developing, and retaining talented managers and administrative staff members
• Ability to juggle many responsibilities at once and to operate both independently and with the flexibility to be part of a team
• Computer literate: Knowledge of Word and Excel and an ability to learn database software
• Bachelor’s degree / Master preferred.
The ideal candidate will demonstrate the following capabilities:

- Commitment to the mission and work of the Diocese with the credibility and persuasiveness to secure support from others
- Familiarity with and a strong commitment to Catholic values.
- A manager who leads by example and exemplifies the values and ethics of the organization
- An organized individual with strong creative and conceptual skills
- A doer who functions effectively without being autocratic or political; must be a team player who is inclusive, flexible, creative, energetic and fair minded
- A decisive and resourceful individual who will accept responsibility and take charge of results, as well as work successfully with limited resources
- A self-starter who is confident enough to express opinions, to forge ahead when appropriate and hold back when necessary, with a sensitivity to the feelings and opinions of others
- An energetic person who is emotionally mature and dependable, a collegial individual.

Compensation:
A competitive compensation package will be offered to attract an outstanding candidate.

Please send resumes to:
Sterling Search, Inc.

Sarah@sterlingsearchinc.com
Phone: 714-433-7040

Direct all correspondence, emails and telephone calls to Sterling Search
Any resumes sent or telephone calls made to OCF will be redirected to Sterling Search

TO APPLY: https://jobs.crelate.com/portal/sterlingsearchinc/job/e85m7rcepk988pxxjzwbgm5zw

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