

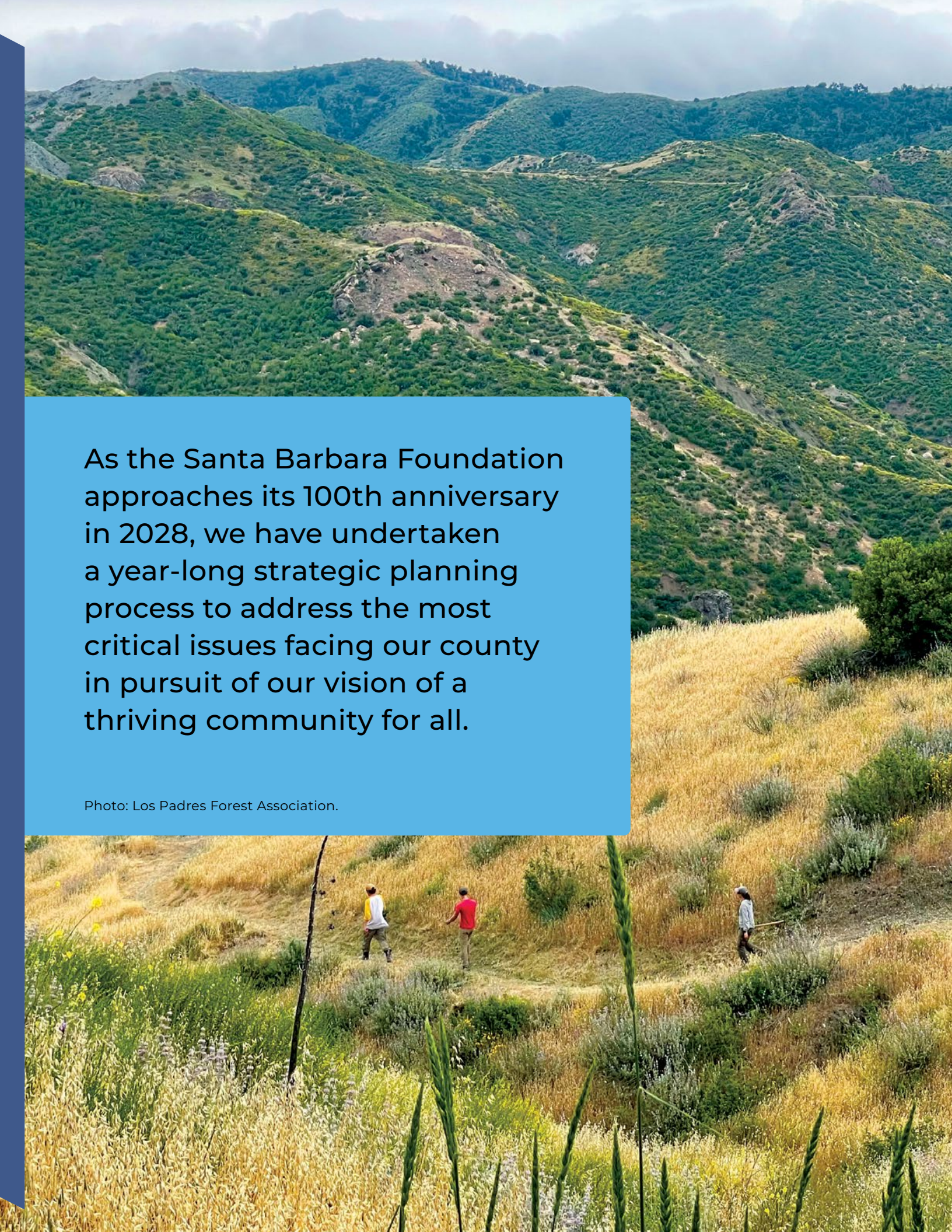


# 2024-2028 Strategic Roadmap



Serving Santa Barbara County





As the Santa Barbara Foundation approaches its 100th anniversary in 2028, we have undertaken a year-long strategic planning process to address the most critical issues facing our county in pursuit of our vision of a thriving community for all.

Photo: Los Padres Forest Association.



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# We are thrilled to share this strategic plan for the Santa Barbara Foundation,

which is the result of tremendous input from our community and thoughtful analysis by our Board and staff. We are grateful for the time and effort invested by so many in this endeavor. Together, we have determined a path forward that builds on past successes and lessons, creating deeper and more value-aligned goals that create opportunities for all to thrive in Santa Barbara County.

As we approach the 100th anniversary of the Santa Barbara Foundation in 2028, this strategic planning process enabled us to listen closely to community members, donors, grantees, peer organizations, civic leaders, staff, and Board members. This process informed a forward-looking and equity-centered plan that enables us to address the needs of those who call Santa Barbara County home at the start of our next one hundred years.

We learned a great deal from our experience meeting community needs during the COVID-19 pandemic. The last three years were a challenging period for our residents and families, but collectively, we fortified our community's resilience by identifying the needs of our neighbors, actively developing solutions, and providing a platform to connect people, ideas, and resources. Our plan for the next five years maintains this spirit of adapting to, and facing, the constantly evolving needs of our communities and donors.

The following report details our comprehensive strategic priorities for the next five years and outlines related goals and objectives. We are excited to begin this work and invite you to join us on this journey toward a thriving community for all.

As you read this plan, know that many individuals contributed to the final result. We are especially indebted to the members of the Strategic Planning Steering Committee who are listed on page 22. We are grateful to live in a community with such generosity of time, talent, and treasure. It was a joy to see so many different parts of our community join together in crafting this plan and we look forward to implementing it in the same fashion.

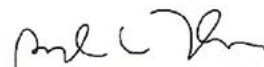
This is our commitment, our vision, and our invitation to join us on this transformative journey through the end of our first century, and the start of our next.



Jackie Carrera  
President & CEO



Stephen Hicks  
Board President



Angel M. Iscovich, MD  
Steering Committee Chair



Photo: California Rangeland Trust.



# Section 2: Executive Summary

As the Santa Barbara Foundation approaches its 100th anniversary in 2028, we have undertaken a year-long strategic planning process to address the most critical issues facing our county in pursuit of our vision of a thriving community for all.

As a community foundation, this planning process was grounded in the best thinking of a wide range of people who are passionate about the well-being of the Santa Barbara County community. These partners are aligned with our mission to mobilize collective wisdom and philanthropic capital across Santa Barbara County to build empathetic, resilient, and inclusive communities. The needs, challenges, and resources in Santa Barbara County have evolved over the last century.

Today the county faces a housing affordability crisis as the fifth least affordable county in the country, in addition to significant gaps in access to quality childcare, internet connectivity, and health care.

At the same time, the county is recognized for its philanthropic spirit, being home to many generous individuals, corporations, and foundations committed to shaping Santa Barbara County into a model of sustainable living and opportunity.

To best understand how the Foundation could address current and future community issues, extensive input was gathered from community stakeholders, donors, grantees, and others. This anchored the plan with an understanding of SBF's highest purpose and role countywide.



*The Land Trust for Santa Barbara County. Photo: Bill Dewey.*

# Executive Summary

Based on this feedback, we designed each of the following strategic priorities to embed our unwavering commitment to diversity, equity, inclusion, and access in all that we do. The plan also seeks to ensure that our impact is felt countywide, that we continue programs with proven success, and that we amplify the Foundation's leadership role in identifying and addressing civic challenges and potential solutions.

## Strategic Priority 1

### Embody & Express our Highest Ideals

This priority focuses on aligning SBF's work with its values and operating principles, building a Foundation that reflects and uplifts all the diversity in the community, and deepening awareness of the Foundation's impact through branding and community engagement.

## Strategic Priority 2

### Invest for Thriving & Resilient Communities

This priority focuses on maximizing the effectiveness of the nonprofit sector, and creating community impact by effecting systems change, supporting key community-led projects, and leading in times of crisis. It underscores our commitment to increasing our presence and services in North and Mid-County and to expanding donor resources for the benefit of Santa Barbara County causes and communities. Finally, this priority features significant new focus on maximizing SBF assets for local benefit, including impact investing.

## Strategic Priority 3

### Inspire Charitable Giving Countywide

This priority focuses on fostering a new culture of philanthropy, increasing philanthropic resources, engaging new and more diverse donors, especially the rising generation, nurturing SBF innovation and attracting new partnerships, and celebrating SBF's 100 years of service through a Centennial Campaign.



# Executive Summary

Implementation of this body of work will require close coordination with SBF's many partners including other nonprofits, community members, businesses, collaboratives, and governmental entities. The plan will exist as a living document with core components, but will be adapted as appropriate, consistent with SBF's role as a community foundation that constantly evolves to meet the changing needs and conditions of our community.



*Santa Maria Studios senior housing. Photo: Veronica Slavin.*

As we look to the future, the success of this plan will depend on expanding our circle of engagement to more friends and supporters of SBF. Together, we are poised to shape a brighter, more prosperous future for everyone in Santa Barbara County.



*AHA! (Attitude. Harmony. Achievement.)  
Photo: Carly Otness.*

SBF Board and staff members tirelessly supported the development of the strategic plan through a multi-phase process. The Strategic Planning Steering Committee and Core Team included 12 Board and staff members and met multiple times a month over the year. The full Board of Trustees approved this plan after input during numerous planning sessions and focus groups to ensure our values of equity and inclusion were embedded in our work.



*St. Vincent's Early Childhood Education Center.  
Photo: St. Vincent's.*

# Section 3: Who We Are

The strategic planning process helped us crystalize our vision for the future of Santa Barbara County, the Foundation's role in achieving that vision, and the values and principles we adhere to in our day-to-day work.

## Vision

A thriving community for all.

## Mission

To mobilize collective wisdom and philanthropic capital to build empathetic, inclusive and resilient communities.

## Values

**Trust** – We build trust by prioritizing accountability and transparency in our work and interactions.

**Learning** – We strive to learn and improve continuously.

**Innovation** – We are innovative in how we seek solutions and support our communities to thrive.

**Inclusion** – We cultivate an environment of inclusion, belonging, knowledge, understanding and well-being.

**Respect** – We are a respectful community.

## Operating Principles

Effective processes, systems, and continuous learning are essential to maintaining a high level of impact. Therefore, we seek to follow best practices and continuously improve to:

- Foster a culture that embodies our values in all of our work.
- Work in partnership, bringing people together to achieve common community goals.
- Ensure our ability to serve Santa Barbara County in perpetuity.
- Safeguard financial assets and provide accurate and timely reporting.
- Assure confidence with data protection, quality, and availability.
- Maintain integrity and comply with applicable laws, regulations, and donor intent.
- Enhance our service to the community with effective operations and facilities management.



# Section 4:

## Collaboration & Partnerships

“If you want to go fast, go alone, if you want to go far,  
go together.”

– African proverb



AHA! (Attitude. Harmony. Achievement.) Photo: Carly Otness.

The Santa Barbara Foundation is, at its core, a connector and a collaborator. The work we do would not be possible if it were not for our partners, donors, nonprofits, community members, peer organizations and civic institutions with whom we coordinate daily. We recognize we are but a piece of the puzzle in meeting the collective needs of our community and rededicate ourselves to these relationships over the next five years.



# Section 5: Santa Barbara County

## The Context in Which We Work

**Santa Barbara County contains many contrasts. From the agricultural fields of Santa Maria Valley to the coastline of Carpinteria, we are a community that enjoys great abundance and has great needs.**



Photo: Veronica Slavin.

Our county is an increasingly expensive place to live. Limited availability of land and challenges in building new housing have contributed to the average monthly apartment rent increasing 25% between 2016 and 2021.<sup>1</sup> Nearly 90% of renters in Santa Barbara County are cost burdened. The National Low Income Housing Coalition reported in 2022 that Santa Barbara has the sixth highest average cost for rental housing in the US.

**According to the California Housing Partnership, Santa Barbara Housing Need 2023, in 2019:**

**29% of renters** are **extremely cost burdened**  
(spending over 50% of income on rent)

**55% of renters** in Santa Barbara County were considered **cost burdened**  
(spending more than 30% of income on rent)



<sup>1</sup> Housing Affordability in the South Coast: Impacts of Past Policies and Potential Pathways for the Future (Rosen Consulting Group). May 2022.



# The Context in Which We Work

Homebuyers face similar challenges; median home prices are 22 times the median income of \$90,100 (2021), making Santa Barbara the fifth least affordable, small metropolitan housing market in the nation and resulting in a lower homeownership rate than the state average.<sup>2</sup>

The affordability gap is even more acute for low-income community members who “face severe cost burden, overcrowding, or substandard living conditions.”<sup>3</sup> California’s Regional Housing Needs Allocation (RHNA) calls for **5,799 additional units of housing for those earning between 31% and 50% of Area Median Income (AMI)** and an additional **3,935 units for those earning between 51% and 80% AMI** in the county by 2031 to meet the needs identified in the 2023-2031 Housing Element Update. Safe, affordable housing continues to be a glaring need in our county.

## RHNA Allocation by Income Level

*Allocation by income level*

<b>Jurisdiction</b>	<b>RHNA Allocation</b>	<b>Very Low 31-50% AMI</b>	<b>Low 51-80% AMI</b>	<b>Moderate 81-100% AMI</b>	<b>Above Moderate &gt;100% AMI</b>
Carpinteria	901	286	132	135	348
Santa Barbara	8,001	2,147	1,381	1,441	3,032
Goleta	1,837	682	324	370	461
Unincorporated (South Coast)	4,142	809	957	1,051	1,325
Lompoc	2,248	166	262	311	1,509
Unincorporated (Lompoc Valley)	521	209	72	54	186
Santa Maria	5,418	1,032	536	731	3,119
Guadalupe	431	3	24	77	327
Unincorporated (Santa Maria Valley)	721	262	118	118	223
Solvang	191	55	39	22	75
Buellton	165	55	37	30	434
Unincorporated (Santa Ynez Valley)	280	93	53	57	77
<b>County Total</b>	<b>24,856</b>	<b>5,799</b>	<b>3,935</b>	<b>4,397</b>	<b>10,725</b>
<b>Total Unincorporated</b>	<b>5,664</b>	<b>1,373</b>	<b>1,200</b>	<b>1,280</b>	<b>1,811</b>

*Source: 2023 SBF Housing Affordability Report*

<sup>2</sup> The Santa Barbara Housing Trust Fund Report 2023

<sup>3</sup> Ibid



# The Context in Which We Work

The high cost of housing contributes to fewer resources available for basic needs. Within our community 42% of households in Santa Barbara County have incomes that don't meet the real cost measures for California, an inequality that is further defined by region within the county (35% in South County, 45% in North and Mid-County, and 53% in some parts of Santa Maria and Orcutt).<sup>4</sup> As of spring 2023, Santa Barbara County had the second highest poverty rate in California with 16.9% of households living below the California Poverty Measure.<sup>5</sup> Many struggle to put food on the table with 12.2% of households receiving food stamps and Supplemental Nutrition Assistance Program (SNAP) benefits. The majority (58.3%) of those receiving SNAP benefits live at or above the poverty level but do not earn enough to fully cover housing and food costs.<sup>6</sup>



Transition House. Photo: Kendall Klein.



Photo: Los Padres National Forest Association.



Santa Ynez Valley Botanic Garden. Photo: Derek Glas.

<sup>4</sup> Real Cost Measure in California 2021 by United Ways of California

<sup>5</sup> PPIC <https://www.ppic.org/interactive/california-poverty-by-county-and-legislative-district/>

<sup>6</sup> Ibid



# The Context in Which We Work

Many of our community members also struggle to access health care. In 2020, 12% of people under the age of 65 did not have health insurance in Santa Barbara County — a rate 50% higher than the State of California (8%). Santa Barbara County also has fewer primary care physicians per capita than the state average.<sup>7</sup>

Many of our communities are more adversely affected by these realities, with disparities in health outcomes based on race, income, and immigration status. Investments in community health workers, including Promotores, improve health outcomes, reduce health care costs, and improve the quality of care, though demand for these programs continues to grow beyond their current capacity.<sup>8</sup>

Likewise, we have critical gaps in providing our children with a strong start in life, endangering the future of our community. Children in Santa Barbara County face uneven prospects with 71% of households with children under six struggling to make ends meet.<sup>9</sup> Families needing child care encounter long waitlists due to a deficit of over 9,000 child-care spaces in our county.<sup>10</sup>

Relatively higher wages in Santa Barbara County, compared to other counties, also create a challenge for families who do not qualify for public programs but also cannot afford market rate child-care providers. Providing child care in Santa Barbara involves obstacles as well, including difficulty recruiting and maintaining staff.

SBF employs a wide variety of tools to tackle critical issues facing our community.

The issues may evolve over time, but we are prepared to bring the right approach to any challenge.

Advocacy  
Aligned Giving  
Awareness/Education  
Civic Engagement  
Convening/Partnerships  
Data/Evaluation  
Facilitation/Events  
Fiscal Sponsorships  
Funder Collaboratives  
Grantmaking  
Impact Investing  
Investment Portfolio  
Parallel Giving  
Philanthropic Services/Advising  
Policy  
Professional Development  
Scholarships  
Thought Leadership

<sup>7</sup> County Health Rankings and Roadmaps, Santa Barbara County

<sup>8</sup> Community Health Workers and Promotores 2021:4

<sup>9</sup> Real Cost Measure in California 2021 by United Ways of California

<sup>10</sup> 2022 United Way report



# The Context in Which We Work

Underlying these disparities is lack of access to our basic information infrastructure. Santa Barbara County faces a 'digital divide.' Nearly 8% of residents have no available internet access, many others experience inadequate connectivity, and still more lack access due to cost or technology limitations.

The gaps in reliable, affordable digital access have far reaching consequences in our increasingly digital landscape, disenfranchising households by limiting their access to education, the workforce, healthcare, and democratic processes. Furthermore, the digital divide disproportionately affects people of color, Indigenous peoples, households with low incomes, people with disabilities, people in rural areas, and older adults.



*St. Vincent's: Photo: J.A. Calitri.*

In addition to socio-economic challenges, we live in a coastal community vulnerable to sea level rise and associated storms and hazards. The natural environment we treasure is also one that is threatened. Though we all feel the impact, marginalized communities are often disproportionately affected by environmental degradation, natural disasters, and climate change.

As a community foundation approaching its 100th anniversary, we have struggled with these issues and work to meet the ever-changing needs of this community. We identify and adjust to emerging challenges, while building community capacity in other areas to broaden our collective impact. We will continue to evaluate and tackle the pressing issues of the future.



# Section 6: Strategic Priorities

SBF will focus on three strategic priorities to optimize its impact throughout the community over the next five years. The Foundation intentionally designed these focal points to not only organize our work effectively but also to embed our unwavering commitment to honoring community diversity, ensuring equitable opportunities for all, amplifying voices that might not otherwise be heard, and providing access regardless of circumstances.

## Strategic Priority 1

Embody &  
Express  
our  
Highest Ideals

## Strategic Priority 2

Invest for  
Thriving &  
Resilient  
Communities

## Strategic Priority 3

Inspire  
Charitable  
Giving  
Countywide



Route One Farmers Market. Photo: Jenny Kearns.



# Strategic Priorities

## Strategic Priority 1

### Embody & Express our Highest Ideals

- Live our values in all we do
- Continue to build a Foundation that reflects and uplifts all the diversity in our community
- Deepen awareness of the Foundation's impact through branding and community engagement

SBF seeks, at all times, to be of the greatest service to our community. To achieve this, **we are steadfast in our commitment to being the best version of ourselves and always living our values to the best of our ability.**

As the largest philanthropic organization in Santa Barbara County, we are aware that the ways in which the Foundation operates sets an example for others.

How we work internally impacts our external partners, donors, grantees, peer organizations, and community members. We embrace this responsibility and hold ourselves accountable to our values in every aspect of our work.

As part of this strategic priority, SBF will seek to maintain high rates of stakeholder satisfaction and connection to our mission. As an organization that is always learning and growing, **we will implement training for all new staff and Board members to maintain a team where all feel they belong and can contribute to our mission.**

Our expectation is that this investment in our culture will be reflected in our relationships with nonprofits in the community, including grantees. We will seek high rates of satisfaction from our donors and nonprofit partners as a method for keeping ourselves accountable to those we serve.

# Strategic Priorities



*Santa Maria Valley YMCA. Photo: Veronica Slavin.*

Over the next five years, SBF will also increase engagements and partnerships with diverse communities within Santa Barbara County to better understand the range of needs within our community and to ensure that we are actively listening to those whose perspectives may be marginalized.

**Internally, we also commit to centering inclusion and belonging in our planning, decision-making, communications, and daily practices.** We will build from our 2022 Diversity, Equity, Inclusion, and Access Audit, a roadmap for operationalizing our policies, processes, and practices, including Board and staff recruitment and onboarding.

We aim for our internal values and operating principles to be expressed and understood externally as well.

Over the next five years, **we will work to increase the community's awareness of SBF's work and impact,** including engaging more community members in North and Mid-County and fostering these relationships through events, digital channels, and accessible, community-facing communications materials.



# Strategic Priorities

## Strategic Priority 2

### Invest for Thriving & Resilient Communities

- Maximize the effectiveness of the nonprofit sector
- Create community impact by effecting systems change, supporting key community-led projects, and leading in times of crisis
- Expand donor resources for the benefit of Santa Barbara County causes and communities
- Maximize SBF assets for local benefit

Our second strategic priority is at the core of our mission to *mobilize collective wisdom and philanthropic capital to build empathetic, inclusive and resilient communities.*

SBF is uniquely positioned to strengthen our community by expanding nonprofit capacity to address basic human needs, such as food, shelter and safety, and access to behavioral health and health care.

Over the next five years, SBF will refine and expand community grants programs that support the critical work of our nonprofit partners increasing our service and presence in North and Mid-County. **Our objective is to enhance the health, capacity, and long-term sustainability of the nonprofit sector to meet the needs of our community.**



Sansum Diabetes Research Institute. Photo: Sara Prince.

# Strategic Priorities

## SBF's Collaboration for Social Impact (CSI)

We believe that a healthy social sector improves the social outcomes for our communities – strong nonprofits lead to a strong community. And the key to strengthening the social sector is nonprofit leaders and organizations having the knowledge, skills and resources to fulfill their mission.

SBF's Collaboration for Social Impact (CSI) elevates SBF's commitment to advancing the strength and capacity of the nonprofit ecosystem in Santa Barbara County through targeted capacity building investments as well as professional/leadership development, technical assistance and sector advocacy that is developed and implemented through an on-going collaboration with community leaders and partner organizations.

As we approach our centennial year, we recognize the importance of advancing solutions for the complex issues in our community that require long-term investments across different disciplines. These “systems change” areas, when successful, can address the root causes of many problems.

**While expanding access to child care, equitable digital access, health equity, and housing affordability are our current areas of focus within systems change, we remain committed to identifying and addressing upstream issues that can prevent downstream hardship for families and individuals in our community.**

Over the next five years, we will also continue to be responsive to community needs by leveraging human and financial resources to support timely community-led projects that advance the Foundation's vision for the community. As a leader and resource to the community, we will continue to convene partners, co-lead on initiatives, conduct research, and monitor community challenges.



# Strategic Priorities

SBF will also continue to lead efforts to mitigate the needs of community members in times of crisis. We learned many lessons from our work during the Thomas Fire, 1/9 Debris Flow, and COVID-19 pandemic, and we developed key capacities to meet the next challenge with new expertise and insight.

**We stand prepared to respond by mobilizing philanthropic resources as appropriate to meet whatever issues arise.**

To accomplish all the above, SBF will also expand resources targeted specifically to Santa Barbara County in the next five years. The generosity of Santa Barbara County donors is felt globally. We will reinforce our efforts to support donors in achieving their charitable goals in Santa Barbara County and aligning with community-identified funding needs.

**We will work with donors to foster a better understanding of the most pressing needs of our community and to activate them for support.**

In the same vein, SBF seeks to elevate our leadership role in the community by investing more of our own assets for local benefit. Through our Impact Investing program, SBF will increase discretionary resources invested in Santa Barbara County projects with the intention to inspire others to follow our lead.



*Collaboration for Social Impact, Board Leadership Institute. Photo: Veronica Slavin.*



# Strategic Priorities

## Strategic Priority 3

### Inspire Charitable Giving Countywide

- Foster a new culture of philanthropy
- Increase philanthropic resources
- Nurture SBF innovation and attract new partnerships
- Celebrate SBF's 100 years of service with a Centennial Campaign

To flourish for the next 100 years, SBF has adopted a third strategic priority that will expand resources for our community to realize its vision of a thriving community for all. This will include fostering a new culture of philanthropy that uplifts a range of giving opportunities and models of philanthropy for donors.

We seek to more accurately reflect the communities served by the Foundation in our donor base. Over the next five years we will focus on engaging younger and more diverse donors and advisors with an emphasis on North and Mid-County relationships.



*Photo: California Rangeland Trust.*

SBF will grow to meet the challenges in our community. **We will identify, educate, and activate new donors and advisors, increase new SBF fundholders, increase assets, and increase contributions to the Community Engagement Fund and SBF Strategic Priorities and Programs,** all in order to increase grants to Santa Barbara County nonprofits.

We will be **innovative in our approach to new partnerships** by developing and implementing an Advisor Managed Investment Account Program and expanding our Impact Investing Program.

Lastly, we will celebrate our 100 years of service with a Centennial Campaign that showcases SBF's collective impact over the last century. These funds will constitute a legacy investment in the well-being of the place we all call home.



# Section 7: Appendix

## Our Process

The strategic planning process unfolded over a twelve-month period using the 2018-2023 plan as its basis. With input from dozens of individuals (acknowledged in the next section) and learnings from input from both Grantees and Donors, our refined plan retains valuable elements from the previous plan while introducing a more structured and actionable approach for moving forward.

The final result is a plan that is aspirational but also operational. The process involved three phases:



A Strategic Planning Steering Committee, chaired by Angel Iscovich, MD, designed and oversaw the process, providing regular feedback on evolving findings.

They served as thought partners for staff and the consulting team and provided valuable guidance on visioning, strategic decisions and direction, troubleshooting, sense-making, and preview of final deliverables. This group met monthly from January to December of 2023.

At the outset of the process, several foundational bodies of work were completed, including SBF's Internal Diversity, Equity, and Inclusion Audit, a Grantee Perception Survey of 81 local nonprofits, and a Donor Perception Survey of 25 community stakeholders.

The information from these sources was pivotal for understanding the position of SBF in the community, where we excel and where we need to strengthen our efforts. The findings from these reports, in addition to previous perception and branding work, provided the basis for the updated strategic priorities.

# Our Process

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The Strategic Planning Steering Committee was supported by the Core Team, composed largely of staff, who ensured the process was connected to the community and day-to-day realities of the work. They provided research insights and integral background information. The Core Team met twice a month between January and December to ensure the quality of the final plan.

The process benefited from high levels of involvement from each member of the Board of Trustees. In addition to those who served on the Strategic Planning Steering Committee, all Trustees engaged with the plan during the Approach/Path stage at Board meetings in June and September of 2023.

In addition, each Trustee participated in focus groups dedicated to specific strategic priorities between these meetings. The full Board of Trustees approved the final plan during the Completion stage at the December 2023 Board meeting.



*Jardin de las Rosas. Photo: People's Self-Help Housing.*



# Our Team

This plan is the result of countless hours invested by Trustees and staff members. We are grateful for their support.

## Board of Trustees

Phil Alvarado	Trustee, Strategic Plan Steering Committee Member
Richard Beswick	Trustee
Rev. Randall Day	Trustee
Pamela Gann	Trustee, Strategic Plan Steering Committee Member
Rafael Gonzalez	Trustee
Stephen Hicks	Board Chair
Angel Iscovich, MD	Trustee, Strategic Plan Steering Committee Chair
Pamela Macal	Trustee
Danna McGrew	Board Treasurer
Robert Nakasone	Trustee
Ernesto Paredes	Trustee
Michael Pfau	Trustee
Susan Richards	Trustee
James Rogers	Trustee
Matt Rowe	Board Vice Chair
Ginger Salazar	Board Secretary, Strategic Plan Steering Committee Member
Lynn Scarlett	Trustee
Alexander F. Simas	Trustee
Tracy Stouffer	Trustee
Zohar Ziv	Trustee

# Our Team

## **Core Team – Also on Strategic Planning Steering Committee**

Angel Iscovich, MD	Trustee, Strategic Plan Steering Committee Chair
Aniston Breslin	Executive Assistant and Board Liaison
Jackie Carrera	President & CEO
Rubayi Estes	Former Vice President, Programs
Stacie Furia	Director of Evaluation and Learning
Evie Rangel	Director of Human Resources and Operations
Tammy Sims Johnson	Vice President, Philanthropic Services
Judith Smith-Meyer	Director of Marketing and Communications
Liz Thasiah	Vice President, Programs
Todd Yuba	Vice President, Finance and Administration



*Photo: California Rangeland Trust.*



# Donor Perception Report Summary



## Fenton + Santa Barbara Foundation Summary of Research Findings & Recommendations

### Overview

The Santa Barbara Foundation (SBF) partnered with Fenton to conduct a comprehensive research and analysis report, and collect key insights to guide the Foundation toward elevating its fundraising profile; strengthening and expanding its relationship with existing donors; and reaching a new generation of donor prospects. Fenton was tasked with providing information on how to best position the Foundation's story moving forward; to influence and shape a narrative that will resonate with donors; and provide SBF a better baseline of where its strengths and potential weaknesses lie with these important stakeholders.

Over the past five months, Fenton conducted a comprehensive assessment of SBF's existing messaging, website, materials, and social media channels to evaluate strengths and gaps. We interviewed 25 key stakeholders that represented donor fundholders, professional financial advisors, donor trustees, nonprofit agency and corporate fundholders, and government representatives. Our team conducted a landscape analysis to examine how peer organizations position themselves and what lessons SBF can adopt from the field.

Based on our thorough research, we developed a series of tailored recommendations on how the Foundation may approach communications around its upcoming strategic plan; position itself with donor audiences and Santa Barbara County (County) more generally; and potentially adjust its value proposition language.

### Overall Reputation

Santa Barbara Foundation's leadership and staff are highly regarded! Stakeholders were effusive in their praise of SBF's leadership and staff. Stakeholders were highly complimentary of staff's responsiveness and knowledge, and were particularly impressed by Jackie Carrera's leadership.

*"I want them to know that they are doing a really good job and the people who work there are wonderful."*

Many stakeholders view SBF as a leader in philanthropy for Santa Barbara.

*"The Santa Barbara Foundation is the leading, if not the dominant, umbrella organization for direct charitable activities consistent with their mission statement and for indirect support for other nonprofits, whether they are incubating or partnering with them."*

### Community and Donor Engagement

The Foundation has room to demonstrate the accessibility of philanthropic giving. SBF's philanthropic and donor engagement are seen as focusing on older, high net worth individuals, most of whom are based in South County.

Stakeholders see SBF as a risk-averse funder. They expressed a desire to see the Foundation support less established local organizations in the County and thus drive different, innovative approaches to local problems.

*"I would like to see the Foundation take a little more risk in terms of who they support. Working a little harder to lift up some of the grassroots organizations."*

There is not a clear understanding that SBF is focused on the needs of all of Santa Barbara County. Awareness varies depending on stakeholders' roles with SBF.

# Donor Perception Report Summary

Santa Barbara Foundation Discovery Findings and Recommendations

Stakeholders expressed a desire for SBF to publicly acknowledge the power dynamics in the funder-grantee relationship. They would like SBF to emphasize partnership with nonprofits over its evaluation of these organizations.

## Messaging and Positioning

Overall, there is a need to strengthen and sharpen how SBF describes its work, priorities, and contributions, and be more consistent in SBF's narrative.

SBF's messaging does not support the Foundation's objectives of being seen as:

1. Accessible,
2. Focused on serving the whole County, and
3. Responsive to the County's diversity.

Stakeholders – even those who are or were actively involved in the Foundation – expressed a difficulty in understanding the mission and full activities of the Foundation. SBF's mission statement is somewhat vague and inaccessible, leaving unclear what the Foundation focuses on through its mobilization of philanthropic capital.

When asked about SBF's strengths and what isn't understood about the Foundation, stakeholders expressed that the role of SBF as a convener was not widely understood or recognized. They shared that this role has the ability to drive long-term positive change for communities.

Stakeholders expressed a desire for SBF to share a clear point of view alongside its strategic plan. Alongside this rationale, they want to see SBF communicate a succinct set of interrelated priorities.

## Information and Outreach

SBF's website can be a powerful tool for communicating with all of its desired audiences. There is opportunity for SBF to more succinctly communicate who it is and emphasize its service to all of Santa Barbara County on its website.

SBF's website can be difficult to navigate with its website tabs and their respective drop-down menus. There are eight drop-down options for donors alone.

Stakeholders shared that the website is out of date and contains too much information. Sharing too much information, across too many pages, interferes with readability and the navigation experience.

Stakeholders shared that the Foundation does a great job at keeping existing donors in the loop. They love the education panels via Zoom and would like to see the pre-COVID in-person seminars held again.

However, it was noted that SBF's communications materials should serve a better educational purpose. Educational materials would help build stakeholders' knowledge and enable them to be better ambassadors for the Foundation.

## Value Propositions

Fenton solicited feedback from stakeholders about draft language crafted by SBF staff that described the Foundation's 'value proposition.' The testing revealed that SBF's donor audiences hold the Foundation in high regard. However, while they agreed with the meaning of the descriptions, they reacted negatively to the tone and felt the language was too lengthy, cold and transactional.

*"It's 100% accurate. But it is a little cold. For me, it didn't hit with any emotion. ... They [SBF] are more active addressing community needs, so I would start using 'partnership' and words like that."*

Advisors and fundholders ranked SBF's community involvement and knowledge, as well as its agility and customer service, as competitive advantages. Advisors appreciate how quickly and easily they can work with SBF staff and shared that working with institutions like Schwab or Fidelity is a more bureaucratic process. They expressed how SBF's ability to seamlessly customize its services for their clients further set the Foundation apart in the philanthropic space and they appreciated SBF's ability to provide creative services for philanthropic goals.



# Donor Perception Report Summary

Santa Barbara Foundation Discovery Findings and Recommendations

## SBF Peer Organization Analysis

There is room to streamline messaging. SBF's mission statement is somewhat vague and inaccessible, leaving unclear what exactly SBF focuses on through its mobilization of philanthropic capital.

There is also an opportunity to better communicate impact. Most organizations surveyed have a dedicated web page used to communicate their impact.

## Key Recommendations

- ✔ To the extent possible, consider how any **new strategic priorities** for the Foundation work together to **advance a specific vision for North and South County**.
- ✔ **Messaging and assets should prioritize a succinct, easily understood definition of who SBF is and what it does.** Revise messaging to incorporate a warmer tone and conversational approach that emphasizes a vision over specific tactics the Foundation can deliver.
- ✔ **Consider emulating the communications of other community foundations in announcing new priorities.**
- ✔ Lean into the role of **SBF as a partner for Santa Barbara County** – through convening, capacity building, and working closely with donors to help them drive positive change.
- ✔ **Publicly engage younger, more diverse potential donors.**
- ✔ Prioritize **dynamic images over static photos** and ensure that **people of color are included** in images.
- ✔ **Invest in the website as a core communications and marketing material.** This might be the first place potential donors come to learn about SBF and existing donors heavily interact with donor interfaces.
- ✔ **Leverage storytelling as a tool and approach to content development.** Storytelling can demonstrate not only the breadth of services and activities that SBF is engaged in, but also the diversity of the communities it partners with and serves.

# Grantee Perception Report Summary



## Overview

Founded in 1928, the Santa Barbara Foundation (SBF or the Foundation) serves Santa Barbara County by bringing together nonprofits and donors to identify and address priority needs in the county. SBF plays a vital role in supporting community-wide systems, such as healthcare and mental health, food security, and support for the homeless, specifically through local nonprofits. In addition to funding and staying informed about the more than 2,000 nonprofits in the county, SBF aims to act as a leader and partner in building organizational capacity in the social sector, educating donors, and creating initiatives to better the lives of Santa Barbara residents.

Anticipating the expiration of its current five-year strategic plan in 2023, SBF engaged Informing Change to conduct a study to surface insights into how the community perceives SBF as a community philanthropic organization. SBF's updated strategic plan, to be developed later in 2023, will be informed in part by the findings from this perception study. SBF also intends this study to provide insights toward developing more equitable relationships with current and potential grantees and facilitating appropriate engagement with smaller nonprofits that lack the dedicated development resources available to larger peers.

In February 2023, Informing Change brought key SBF staff<sup>1</sup> together to identify the key questions they wished to answer through this perception study. The main questions emerging from that process were:

1. How responsive is SBF to grantee needs, questions, etc.?
  - a. How transparent can grantees be with SBF?
2. How do grantees experience the application and reporting requirements for SBF?
  - b. Is the effort of applying for grants worth the amount of money awarded?
  - c. To what extent has SBF contributed to the financial stability of grantees?
  - d. Has SBF helped grant recipients leverage other funding?
3. How has SBF contributed to capacity building efforts for local grantees?
  - e. Has SBF increased grantees' ability to advocate for themselves?
4. How has SBF supported partnerships and collaboration in the county's social sector?
5. Is SBF addressing the county's most pressing needs?
6. What do grantee staff and community members see as SBF's ultimate mission and purpose?

<sup>1</sup> These key Santa Barbara Foundation staff members were: Rubayi Estes, Vice President, Programs; Jenny Kearns, Director of Grantmaking; Gary Clark, Director of the Collaboration for Social Impact; Stacie Furia, Director of Evaluation and Learning; and Petra Gomez, Director of Strategic Initiatives and Partnerships.



# Grantee Perception Report Summary

## EXECUTIVE SUMMARY

INFORMING CHANGE 2

### Findings

- Santa Barbara Foundation has a positive and esteemed reputation among nonprofit staff. Most study participants view SBF staff as approachable and accessible.
- Some nonprofit staff have noticed staffing and structural changes over the years. While participants welcome many of the changes, they perceive a lack of consistency and clear articulation about these shifts.
- Many of these changes stem from the Foundation's shift toward trust-based philanthropy.
- Participants generally view SBF's grantmaking processes & requirements as clear and on par with or better compared to other funders.
- While some participants describe SBF funding as substantially contributing to their organization's financial stability, many respondents view general operating support as lacking.
- Grantee staff appreciate both financial and non-financial forms of capacity building, although there is always a desire for more.
- Many focus group participants appreciate the Foundation's existing collaboration efforts and would value even more opportunities.
- Some grantee employees see the Foundation soliciting input from the nonprofit community and facilitating opportunities for them to engage with each other.
- Some participants desire SBF to more proactively connect donors with local nonprofit organizations.
- Housing was by far the most mentioned critical community need, with a few grantee employees discussing the overlap between housing and issues, like workforce development and mental health.
- Study participants see housing as an area where SBF could invest more resources, as the housing crisis affects organizations in many ways, including their ability to retain staff.

## EXECUTIVE SUMMARY

INFORMING CHANGE 3

### Recommendations



#### IMPROVE SBF'S COMMUNICATIONS

SBF could enhance its image throughout the county by clarifying the Foundation's strategic objectives and grantmaking priorities. A cohesive communications strategy could help community organizations understand both the limits of and opportunities for SBF's resources.

SBF should also consider how to effectively communicate its new emphasis on DEIA, especially for organizations less receptive to this new approach.



#### INCREASE TRANSPARENCY & EDUCATION AROUND DAFS

A few study respondents even note wanting SBF to use its influence and connections to advocate more for the nonprofit sector and the living standards of its employees.

While SBF provides donor education, nonprofit organizations would welcome learning about what information SBF shares with its donors.

Nonprofits may also benefit from more information about how community foundations work generally and the types of donations SBF receives.



#### LEAN FURTHER INTO TRUST-BASED PHILANTHROPY

Consider more general operating support and even longer grant periods to strengthen the capacity of small organizations.

Consider coordinating grant application and reporting requirements with peer funders.

Increase communication about how SBF uses and acts upon community input.

Provide more trainings and convenings to address the strong desire for additional spaces where nonprofit organizations can gather, network, and collaborate.





Photo: Wilderness Youth Project.





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### South County Headquarters

1111 Chapala Street, Suite 200  
Santa Barbara, CA 93101  
(805) 963-1873

### North County Headquarters

2625 South Miller Street, Suite 101  
Santa Maria, CA 93455  
(805) 346-6123

Email: [info@SBFoundation.org](mailto:info@SBFoundation.org)

Presented By:

# La Piana

C O N S U L T I N G

[www.lapiana.org](http://www.lapiana.org)