



Executive Director

Live Oak, a nonprofit organization in Silicon Valley, seeks a fundraising and client recruitment professional with a passion for serving the senior community, and with experience leading teams that deliver direct services to dependent seniors with mild to moderate dementia.

Supported by a team of program professionals, the Executive Director's key metrics will be demand for Live Oak services, quality of services, caregiver satisfaction and the organization's financial strength.

Candidates must have a proven track record of engaging new funders and program participants and forging productive partnerships with a broad range of health, church, community and senior support organizations and with diverse funders.

BACKGROUND & OPPORTUNITY

Located in Santa Clara County, Live Oak provides services, social contact and care that improves the quality of life for seniors with mild to moderate dementia, Alzheimer's and associated conditions. The organization also provides support for the caregivers and families of program participants, advocates for Santa Clara County seniors, and functions as a knowledge and support clearing house to those seeking information.

Live Oak began its Adult Day Services within a church in Los Gatos, CA in 1983 serving eight clients, two days per week. Today, Live Oak operates four Centers throughout the community with a staff of 22 employees serving 200 clients annually. Live Oak's budget is approximately \$1.5M, with services funded roughly by 35% public support, 50% fees paid by participants, and 15% other donations and investments.

The day programs are designed to provide cognitive stimulation for dependent seniors, prevent social isolation, and delay or prevent unwanted institutionalization. For caregivers, Live Oak provides a respite from caregiving. The organization also orchestrates meet-ups and support groups and offers referral services that help maintain program participants in the family home. Live Oak strives to provide these services without significant financial burden for those with limited resources. Live Oak emphasizes compassion, advances dignity, improves physical & mental health, and strengthens family & community bonds.

The Public Policy Institute of California states that by 2040, 22% of Californians will be 65 or older, up from 14% in 2020. "This shift will result in an old-age dependency ratio of 38 older adults for 100 working-age adults, up from 24 in 2020, and the highest ever recorded." Such data provides the predicate for substantial growth for Live Oak, its participants and services.

The Executive Director's primary responsibility is to ensure that the organization remains financially strong as it delivers on its mission and position Live Oak to continually evolve its highly respected services.

BASIC FUNCTION

The Executive Director is responsible for client recruitment; assuring that clients and their families are satisfied with all interactions with Live Oak; and financial sustainability, including maximizing

contributed and earned income funding. The Executive Director will cultivate partnerships with communal organizations, religious institutions, hospitals and other service providers who have strong connections with seniors who could benefit from the kinds of services provided by Live Oak.

This position requires a combination of business acumen; the ability to identify families and individuals in need of services; experience working with partners to orchestrate successful engagement with families and funders; leading and inspiring teams; and a passion for the well-being of the aging population.

While the Executive Director must assure that service quality is maintained, the staff and operating infrastructure must be shaped so that the Executive Director can attend to the organization's financial strength while growing the number of program participants. This requires an ability to interact compassionately with people at their most vulnerable in a way that brings families into the circle of support provided by Live Oak without the Executive Director personally orchestrating care. This leader must empower staff leaders at each of the four Centers while assuring that common standards are maintained. It is anticipated that the Executive Director will also hire a new COO to replace a retiring leader who manages cashflow, compliance and infrastructure.

In the first three months the Executive Director will:

- Thoroughly understand Live Oak – its history, clients, staff, facilities, programs & services, partners, culture, infrastructure, finances and sources of revenue, and sources of current and prospective participants in Live Oak programs.
- Develop strong relationships with the Board and staff and develop plans for evolving both the Board and staff in ways that will improve the organization's finances, fundraising, community relations, client recruitment and quality of services offered. Hire a COO (title to be determined) or promote from within.
- Drive the strategic planning processes along with Board, staff, and stakeholders to set short-, medium-, and long-term goals and ambitions; set up metrics for progress and monitor movement toward goals; iterate on the plan as the organization learns what's working.
- Develop plans for direct outreach and solicitation of donors including a fundraising event, grant request submissions, and strategy and processes for a planned giving campaign; discussion of give, get or volunteer standards for Board members; development of in-kind solicitations; and review of the organization's marketing materials and outreach to donors and prospective participants.

This leader must have an entrepreneurial spirit, a strong commitment to long-term financial sustainability, and a social service heart.

ONGOING RESPONSIBILITIES FOR GROWTH & SUSTAINABILITY

The Executive Director will serve as a creative, solution-oriented staff and community leader focused on driving Live Oak growth, and will cultivate the team, donors and volunteers to build relationships that achieve these objectives. Other responsibilities include:

- Foster transparency and accountability in matters relating to Live Oak's financial condition, ensuring that financial performance positively tracks with the revenue and expense budgets and operating plans.
- Explore opportunities for growth and new programs, in the process creating new partnerships/relationships that support Live Oak clients; continually improve the value proposition for area seniors and their families, funders, partners and others in the

community, with particular attention to competitors in this market who also provide services to seniors.

- To ensure full capacity, the Executive Director will:
 - Develop relationships with organizations and individuals positioned to refer prospective Live Oak clients and participants, including relationships with hospitals, religious institutions, communal organizations, care providers and networks that families rely upon as they support seniors;
 - Orchestrate interactions with people who might benefit from Live Oak services, which requires compassion, sensitivity and a high degree of emotional intelligence;
 - Collaborate with area families to shape services that they will embrace and, in the process, introduce Live Oak staff and capabilities to these families;
 - Close agreements, with appropriate information on services provided and with a strong sense of the financial attributes of these services and of the needs and constraints of different families; and
 - Transition families to the care of the direct services team in a graceful way so that services can begin.

Additionally, the Executive Director will:

- Understand the evolving needs, desires and demographics of older adults; seek their insights, and stay connected and accessible to clients and the overall aging sector as a matter of practice; maintain a strong working knowledge of the field's significant trends and developments.
- Assure seamless communication among all involved in serving and interacting with Live Oak clients, including:
 - Ensure a balanced mix of earned and contributed revenue and services with outcome goals that are understood by the Live Oak team, are consistent across the four Centers, and are shared with Live Oak stakeholders.
 - Ensure proper administration of contracts and service agreements and that Live Oak services meet legal requirements, and the terms of service agreed with families.
- Actively participate in the planning and implementation of new Live Oak programs and activities in response to market need; conduct workshops and group collaborations with community partners, health care institutions, and businesses.
- Recruit, manage and provide exceptional leadership, open communication and support to the team, and encourage opportunities for collaboration, growth and professional development.
- Engage in activities that advance Live Oak's mission and awareness; maintain and promote a positive understanding for Live Oak by serving as a credible, articulate and effective spokesperson, in person and in writing to families, partners and community members; ensure that Live Oak is recognized for its leadership and outcomes that benefit seniors and their families.
- Actively cultivate positive relationships with public agencies, foundations and other funders, community partners, businesses and key organizations; ensure the funding process and all reporting and documentation requirements are proactively managed, and deadlines are met.

- Serve as an advocate and effective spokesperson on healthy living and aging; become a bridge for those who are not focused on aging yet.

EXPERIENCE, QUALIFICATIONS and CHARACTERISTICS

The successful candidate will be a compassionate, business-oriented, and mission-driven nonprofit leader with many of the following experiences and sensibilities:

- Three to five years of proven senior-level leadership driving evolving services to seniors and their families who must navigate a variety of health and other challenges, including an entrepreneurial innovative approach to service delivery and systems; demonstrated understanding and curiosity about innovation and trends in aging.
- Solid understanding of nonprofit business fundamentals, knowledge of organizational planning, strategy development and implementation; budgeting; the ability to develop and use data to inform decisions and metrics to measure progress toward goals.
- A proven people manager to lead and foster a positive team culture and high morale across the organization; a management style that is results-oriented; adept at planning, prioritizing, organizing, delegating and following through.
- A charismatic leader comfortable with public speaking and engaging with the donor community and government organizations; excellent verbal and written communication skills; ability to speak clearly and concisely when conveying complex or technical information.
- One who values the contributions and perspectives of a culturally diverse staff, clientele and community; respects the subject matter expertise of others; genuine with a high level of emotional intelligence; diplomatic, gracious, humble.
- A team player who values and models working collaboratively but is not afraid to make difficult decisions; one who sets the bar high for self and the team and strives for accountability; a high energy level with a can-do attitude.
- Bachelor's degree from an accredited college or university. Familiarity with Santa Clara County would be an advantage.

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